



# Infor System21 Telesales

Product Guide

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# Contents

- About this guide ..... 11**
  - Intended audience ..... 11
  - Related documents ..... 11
  - Contacting Infor ..... 11
  
- Chapter 1 Overview ..... 13**
  - Introduction ..... 13
    - Maintenance Functions ..... 14
    - Processes ..... 14
    - Reporting and Enquiry ..... 14
  - Telesales Style ..... 15
    - Telesales ..... 15
    - Planned Delivery ..... 15
    - Telemarketing ..... 15
  - Relationship to Other Applications ..... 16
  - Application Configuration ..... 16
    - Maintenance of Reference Data ..... 17
    - Operators ..... 17
    - Buying List ..... 18
    - Customer Contacts ..... 18
    - Call Profiles ..... 18
    - Delivery Profiles ..... 18
    - Sales Prompts ..... 19
    - Promotions ..... 19
    - Item Families ..... 19
    - Reason Descriptions ..... 20
    - Generate Call Lists ..... 20
    - Manage Call Lists ..... 20
    - Record Order Details ..... 21

Create Sales Orders .....	21
Work Planning.....	22
Performance Analysis.....	22
Preparing to Use Telesales .....	22
Links to Applications.....	22
How Will the Telesales Application be Used?.....	23
Discussion with Customers .....	23
Are the Operators Trained? .....	23
Basic Data.....	24
Company Profile.....	24
Operator Profiles .....	24
Buying Lists .....	25
Customer Contacts.....	25
Call Profiles .....	25
Promotions .....	25
Reason Codes .....	25
Initial Data Take On .....	26
<b>Chapter 2 Maintenance.....</b>	<b>27</b>
Maintaining Telesales .....	27
Operator Profiles [1/TSM] .....	27
Operator Profiles Select Window .....	27
Operator Profiles Maintain Window .....	28
Buying Lists [2/TSM] .....	29
Buying List Select Window .....	29
Buying Lists Maintain Window .....	30
Buying List Copy Item Select Window .....	31
Customer Contacts [3/TSM].....	32
Customer Contacts Customer Select Window .....	32
Customer Contacts Select Window .....	33
Customer Contacts Maintain Window.....	33
Call Profiles [4/TSM] .....	34
Call Profile Customer Select.....	34
Call Profile Select Profile Window .....	34
Customer Call Profile Maintain Window.....	36
Customer Contact Selection Pop-up.....	38
Delivery Profiles [5/TSM] .....	38

---

Delivery Profiles Customer Select.....	38
Delivery Profiles Maintain Window.....	39
Sales Prompts [6/TSM].....	41
Sales Prompts Select Window.....	41
Sales Prompts Maintain Window.....	41
Promotions [7/TSM].....	42
Promotions Select Window.....	42
Promotions Maintain Window.....	43
Item Families [8/TSM].....	45
Product Families Base Item Select Window.....	45
Product Families Promotion Item Select Window.....	46
Product Families Maintain Window.....	46
Reason Descriptions [9/TSM].....	47
Reason Codes Select Window.....	47
Reason Codes Maintain Window.....	47
<b>Chapter 3 Processing.....</b>	<b>49</b>
Telesales Processing Introduction.....	49
Generate Call Lists [31/TSP].....	49
Call List Generation Window.....	49
Manage Call Lists [22/TSP].....	51
Call Management Pause Window.....	51
Call Management Graph Window.....	51
Call Management Summary Window.....	52
Call Management Call Action Window.....	52
Call Management Spread Pop-up.....	53
Reschedule Call Pop-up.....	54
Change Operator Pop-up.....	55
Outgoing Calls [1/TSP].....	55
Call Selection Window.....	56
Establish Contact Window.....	57
Enter Order Item Details Window.....	59
Add an Item Pop-up.....	61
Enter Order Item Details Actions Pop-up.....	61
Actions - Display Pricing Detail Window.....	61
Actions - Display Line Values Window.....	62
Actions - Display Whole Order Details Pop-up.....	62

Actions - Display Previous Order Details Window.....	63
Actions - Display Customer Promotions Pop-up .....	63
Actions - Display Sales Prompts Pop-up.....	64
Actions - Retrieve Previous Orders Window.....	64
Actions - Display Planned Delivery Detail Window.....	64
Actions - Additional Overrides Pop-up .....	65
Additional Overrides Customer Attributes Pop-up.....	67
Order Close Window.....	69
Order Close Source an Item Pop-up.....	70
Stock Figures Pop-up .....	70
Order Close Actions Pop-up .....	71
Order Close Maintain Payment Details Pop-up.....	71
Maintain Payment Details Bank Details Override.....	72
Order Close Acceptance Window.....	73
Order Close Maintain Additional Charges Pop-up.....	74
Incoming Calls [2/TSP].....	75
Incoming Calls Customer Selection Window .....	75
Incoming Calls Call Selection Window.....	75
Telesales Processing Introduction.....	76
Generate Call Lists [31/TSP].....	77
Call List Generation Window .....	77
Manage Call Lists [22/TSP].....	78
Call Management Pause Window .....	79
Call Management Graph Window.....	79
Call Management Summary Window.....	79
Call Management Call Action Window.....	80
Call Management Spread Pop-up .....	81
Reschedule Call Pop-up .....	81
Change Operator Pop-up .....	82
Outgoing Calls [1/TSP].....	82
Call Selection Window .....	83
Establish Contact Window.....	85
Enter Order Item Details Window.....	86
Add an Item Pop-up.....	88
Enter Order Item Details Actions Pop-up .....	88
Actions - Display Pricing Detail Window.....	89
Actions - Display Line Values Window.....	89

---

Actions - Display Whole Order Details Pop-up .....	89
Actions - Display Previous Order Details Window.....	90
Actions - Display Customer Promotions Pop-up .....	91
Actions - Display Sales Prompts Pop-up.....	91
Actions - Retrieve Previous Orders Window.....	91
Actions - Display Planned Delivery Detail Window.....	92
Actions - Additional Overrides Pop-up .....	92
Additional Overrides Customer Attributes Pop-up.....	94
Order Close Window.....	96
Order Close Source an Item Pop-up.....	97
Stock Figures Pop-up .....	98
Order Close Actions Pop-up .....	98
Order Close Maintain Payment Details Pop-up.....	99
Maintain Payment Details Bank Details Override.....	100
Order Close Acceptance Window.....	100
Order Close Maintain Additional Charges Pop-up.....	101
Incoming Calls [2/TSP].....	102
Incoming Calls Customer Selection Window .....	102
Incoming Calls Call Selection Window.....	103
Telesales Processing Introduction.....	104
Generate Call Lists [31/TSP].....	104
Call List Generation Window .....	104
Manage Call Lists [22/TSP].....	106
Call Management Pause Window .....	106
Call Management Graph Window.....	106
Call Management Summary Window.....	107
Call Management Call Action Window.....	107
Call Management Spread Pop-up .....	108
Reschedule Call Pop-up .....	109
Change Operator Pop-up .....	109
Outgoing Calls [1/TSP].....	110
Call Selection Window .....	111
Establish Contact Window.....	112
Enter Order Item Details Window.....	114
Add an Item Pop-up.....	115
Enter Order Item Details Actions Pop-up .....	116
Actions - Display Pricing Detail Window.....	116

Actions - Display Line Values Window.....	117
Actions - Display Whole Order Details Pop-up .....	117
Actions - Display Previous Order Details Window.....	118
Actions - Display Customer Promotions Pop-up .....	118
Actions - Display Sales Prompts Pop-up.....	119
Actions - Retrieve Previous Orders Window.....	119
Actions - Display Planned Delivery Detail Window.....	119
Actions - Additional Overrides Pop-up .....	120
Additional Overrides Customer Attributes Pop-up.....	122
Order Close Window.....	124
Order Close Source an Item Pop-up.....	125
Stock Figures Pop-up .....	125
Order Close Actions Pop-up .....	126
Order Close Maintain Payment Details Pop-up.....	126
Maintain Payment Details Bank Details Override.....	127
Order Close Acceptance Window.....	128
Order Close Maintain Additional Charges Pop-up.....	129
Incoming Calls [2/TSP].....	130
Incoming Calls Customer Selection Window .....	130
Incoming Calls Call Selection Window.....	130
<b>Chapter 4 Enquiries .....</b>	<b>133</b>
Telesales Enquiries Introduction.....	133
Enquire on Call Lists [1/TSE, 21/TSP].....	133
Call Enquiry Select Window.....	133
Call Enquiry Call Select Window.....	134
Call Enquiry Detail Window .....	134
Call Enquiry More Detail Window.....	136
Call Enquiry Detail Call Action Pop-up.....	137
Call Action Detail Pop-up.....	138
Whole Order Enquiry [2/TSE].....	138
Stock Availability Enquiry [3/TSE].....	139
<b>Chapter 5 Reports .....</b>	<b>141</b>
Telesales Reports Introduction.....	141
Report by Customer Details [21/TSE] .....	141
Customer Details List Select Window.....	142
Report by Sales Prompts [22/TSE] .....	143



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List Sales Prompts Select Window.....	143
Report by Operator Profiles [23/TSE].....	143
List Operator Profiles Select Window .....	144
Report by Reason Codes [24/TSE].....	144
Report by Promotion Details [25/TSE].....	145
Promotion Details List Select Window .....	145
Report by Buying Lists [26/TSE].....	145
Print Buying Lists Select Window.....	146
Report by Performance Statistics [27/TSE].....	146
Performance Statistics Select Window .....	147
<b>Chapter 6 Utilities.....</b>	<b>149</b>
Subsystem Introduction.....	149
Telesales Company Profile [1/TSU] .....	149
Company Profile Company Selection Window.....	150
Company Profile Maintain Controls Window.....	150
Company Profile Maintain Policy Controls Window.....	152
Order Presentation Maintain Window .....	152
Maintain Next Call Logic Window.....	154
Activate Today's Sales Prompts [31/TSU] .....	154
<b>Appendix A Glossary.....</b>	<b>155</b>



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## About this guide

The purpose of this document is to describe the functions that can be used within the [Telesales](#) Module.

## Intended audience

The guide is intended for any users of the TS [Telesales](#) business module.

## Related documents

You can find the documents in the product documentation section of the Infor Support Portal, as described in "Contacting Infor" on page 11.

## Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

The latest documentation is available from [docs.infor.com](https://docs.infor.com) or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).



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# Chapter 1 Overview

## Introduction

In an increasingly competitive sales environment greater emphasis is placed on proactive selling. One of the most potent weapons in the salespersons armoury is the telephone. It is no longer enough to wait for customers to call or write with the details of an order - everything that can be done to get the order must be done. The costs of trained sales office personnel and telephone charges make it essential every call is productive. The economics of making the calls and sophisticated computer support for the sales staff must be measured and evaluated.

There is a wide range of uses for [telesales](#) applications including:

- Cold calling
- [Telemarketing](#)
- Taking of an expected order from an existing customer for an agreed list of items.

Each type of call is conducted in a different manner, although common elements of support can be provided by a computer system.

[Telesales](#) supports the Sales Operator so that the sales process is fast, accurate and causes the least disruption to both customer and sales office. This requires a structured dialogue, ideally with the buyer and seller using the same “script”. This is not possible in a cold call situation, but all of the support information is available to the seller.

The response time from the computer system should be such that it will not normally cause the seller to request the buyer to pause. This performance is related to computer resources but great care has been taken to ensure an optimised window response time.

[Telesales](#) uses a daily list of calls, divided amongst the [Telesales](#) operators. Some calls have specific times at which they should be made, others only the date.

Supervisory functions manage and re-assign the work to be done. The [Telesales](#) module contains the following tasks:

## Maintenance Functions

- [Telesales](#) Company Profile
- [Operator Profiles](#)
- [Buying Lists](#)
- [Customer Contacts](#)
- [Call Profiles](#)
- [Delivery Profiles](#)
- [Sales Prompts](#)
- [Promotions](#)
- Item Families
- Reason Descriptions

## Processes

- Outgoing Calls
- Incoming Calls
- Manage [Call Lists](#)
- Generate [Call Lists](#)
- Create Sales Orders

## Reporting and Enquiry

- Enquire on [Call Lists](#)
- Report by [Buying Lists](#)
- Report by Customer Details
- Report by [Operator Profiles](#)
- Report by [Sales Prompts](#)
- Report by Reason Codes
- Report by [Promotion](#) Details
- Report by Performance Statistics

## Telesales Style

Three distinct styles of [Telesales](#) are supported by the application:

- [Telesales](#)
- [Planned Delivery](#)
- [Telemarketing](#)

## Telesales

[Telesales](#) is where an expected order is being taken from a known customer with an established buying pattern. [Telesales](#) generates the [call list](#) for the day, identifying the sales operator, time and the sales contacts. When a call is selected, the customer's [buying list](#) is displayed. The list of items and the order history is displayed. Selecting a function replaces the order history with price and discount information.

[Telesales](#) enables entry of the order information. At the end of the entry of order line information the application will display an order summary. Following the closing of the order the remaining calls are then displayed, allowing the next customer to be selected.

## Planned Delivery

[Planned delivery](#) is a form of [telesales](#) developed for the confectionery/tobacconist wholesale market. In this kind of order entry the customer quotes his current stock levels, application having previously calculated his average weekly demand.

Using this information, the quantity to be ordered is calculated and automatically entered as the order quantity. The order closing procedures are as for standard [telesales](#) and you can adjust the order quantity if necessary. This ensures a minimum stock holding with little risk of running out of stock.

## Telemarketing

In [Telemarketing](#) you are contacting of customers where the chances of taking an order are very much reduced. You can create a call diary supported by the same call back and reschedule facilities as other areas of [Telesales](#).

It can be seen that the process of referring to a call diary, selecting an account and displaying a definable list of items can support a wide range of [telesales](#) activities.

## Relationship to Other Applications

[Telesales](#) is a standardised product operating under the control of System Manager. [Telesales](#) is one of a group of Advanced Application modules which extend the functionality of Base Applications modules.

The following applications are prerequisites to the operation of [Telesales](#):

- Sales Order Processing
- Inventory Management

If [planned delivery](#) is to be used:

- Sales Analysis

The objective of [Telesales](#) is to build standard sales orders. All of the standard sales order functions are used to service the order. This includes batch allocation, picking, despatch and invoicing, as well as the full range of enquiries and reports.

As part of the recording of the sales order, the application will perform a check on available stock and highlight any shortage conditions. If [Planned Delivery](#) is used, then it is necessary to have access to the sales history of a customer so that the average usage for the customer can be calculated; this will be derived from the Sales Analysis Database.

## Application Configuration

[Telesales](#) is multi-company, the characteristics of each company being maintained on a control file. Before a company can be set up Sales Order Processing and Inventory Management must be installed and configured for the company. The control information may then be maintained.

This can be divided into the following classes of data:

Company standard policy controls for:

- [Telesales](#) type
- Contact types
- Operator performance and rest periods
- [Buying lists](#)
- Target for action messages
- Request for performance statistics

Text:

- Operators
- [Call Profiles](#)
- [Buying Lists](#)
- Contacts
- [Delivery Profiles](#)



- [Promotions](#)

Description Identities for:

- [Promotion](#) types
- Delivery routes

You can configure the presentation of data in the order recording process, by selecting Presentation Design on the Company Maintenance window. You can configure, for example, the number of decimal places for the quantity during order entry, the display of the date and the standard concatenation of item number and description.

## Maintenance of Reference Data

Common features in the way in which data is maintained are:

- Standard item and customer search routines have been adopted.
- [Telesales](#) makes the minimum use of codes and where they are employed a prompt is available to select the correct one.
- Selection is normally from a displayed list or by the entry of a code.

Information for the following may be maintained:

- Operators
- [Buying lists](#)
- [Customer contacts](#)
- [Call profiles](#)
- [Sales prompts](#)
- [Promotions](#)
- Item families
- Reason descriptions

## Operators

All people using [Telesales](#) for taking and managing calls must be identified to the application. User details include name and application user ID, as well as standard times; for calls, rest period and the working day, and the type of [telesales](#) calls in which the operator is proficient.

The degree of freedom the operator is allowed to change the sequence in which calls are to be made or to divert them to another operator is also maintained.

## Buying List

[Telesales](#) aims to provide the operator with a list of items to discuss with a customer. Many companies will have a standard list of items which can be used as a basis for a call to most Customers. To enable [Telesales](#) to identify the customer's specific requirements, and minimize the call time, certain accounts will use bespoke lists. [Telesales](#) allows you to create and amend such lists by direct entry or by copying part or all of existing lists.

It is possible to create a list at the appropriate level, and also to automatically build the description of the item that will be displayed to the operator. The customer's item number may be displayed as well as the in-house item number.

## Customer Contacts

[Telesales](#) allows you to create and amend any number of [customer contacts](#). The contact name and details, telephone extension number and comments can be stored. When a [call profile](#) is being created, the prime contact for that call will be selected from the list of contacts.

## Call Profiles

[Telesales](#) establishes diaries for the calling of customers. There are a number of attributes which can be recorded which are necessary to control the frequency and nature of the calls. They can be conveniently grouped under the following five headings:

- How to contact - telephone, fax, telex numbers
- Whom to contact - preferred or prime contact
- Whose responsibility - sales operator
- Nature of contact - [buying list](#) and type of call
- When to contact - time of the day, days of the week and weekly frequency

Full additional text facilities are provided.

## Delivery Profiles

[Telesales](#) is used to synchronise the [customer contact](#) with a delivery pattern. In this way the company can make the best use of its transport expenditure and increase the efficiency of its despatch operation.

As with [call profiles](#) the information can be grouped:

- How to contact - telephone, telex, fax
- Whom to contact - primary contact

- When delivery is convenient - times of the day, days of the week and weekly frequency
- Geography - delivery route, drop sequence number

Full additional text facilities are provided.

## Sales Prompts

Key reminders are frequently presented to the operator. This might relate to stock shortages or surpluses, pending price changes or general messages. Each message is controlled by an effectivity date. The messages will be displayed one at a time, in sequence, at the top of the diary management and order taking windows, so that each time the **Enter** key is pressed, the prompt changes.

## Promotions

[Telesales](#) does not attempt to support and manage all aspects of [promotions](#). It seeks to provide a basic recording of when they take place and the scope and nature of the [promotion](#). The following information can be recorded:

- The [promotion](#) type
- The dates when it is operational
- What it is called and its [promotion](#) number
- The target increase in sales
- The constraints
- The item which is being promoted or all items
- A specific customer or customer class
- Price list and/or discount group
- Combination of customer characteristics

If an item is to be substituted by a [promotional](#) item this can be defined on the [promotion](#). This can be used to effect the replacement at order entry if the [promotion](#) is accepted.

## Item Families

[Planned Delivery](#) requires that items be linked together into an [item family](#) for the purpose of analysing sales in generic markets. This is achieved by creating a family like a Bill of Materials.

For example, a family could have a base item of vanilla and any number of [promotion](#) items or flavours. All items both base and [promotion](#) must be complete items defined to Inventory Management. Families are set up and maintained directly or are automatically created by defining a [promotion](#) with a [promotional](#) item.

## Reason Descriptions

[Telesales](#) can set objectives for the Sales Operators and exercises a degree of control and measurement over their performance. If an operator is unable, either by typing in a code or selecting one from a list, to achieve the expected action at the expected time they will be required to give a reason. Reason codes appropriate for the company can be set-up and maintained as required.

## Generate Call Lists

This is normally run at the end of each working day to prepare the [call list](#) up to a specified date. The following actions can be performed as part of this run:

- Make an entry in the [call list](#) for all [call profiles](#) with a date, less than or equal to the specified date of the run.
- Generate a skeleton order based upon the nominated [buying list](#) for the [call profile](#).
- Generate the prices and discounts for the customer/items on the [buying list](#).
- Generate order history for the specified number of weeks or orders.

The first two of these are always performed, while pricing and order history will be done if requested. The defaults for their inclusion in the run are on the company control file. You can balance the workload between [call list](#) generation and response times by changing the run time parameters to try different combinations.

## Manage Call Lists

You can manage the [call lists](#) using the options below. Each operator has an authority level reflecting the options they can use. The following authority levels are available:

- 0 - The operator must take the next call in sequence.
- 1 - The operator may take any call next.
- 2 - The operator may amend the time of the call.
- 3 - The operator may change who is to make a call.

Operators can use options below their level, i.e. a user authorised to option 2 also has access to option 1. Two lists are created, both sequenced by Operator and Date. Timed calls are added to one and untimed to the other. The [call list](#) is displayed with timed calls at the top and untimed at the bottom.

[Telesales](#) takes the average call time for the operator and adds it to the current time. If no timed calls are due by the calculated time, it selects an untimed call. This calculation is performed each time the window is selected or the Refresh option is taken. Similarly each time the Call Selection window is displayed one of the [Sales Prompts](#) will be displayed. Only operators with an authority level of 3 can re-organise and re-distribute the [call list](#) of another operator. If a call is selected but contact is not completed, the operators can request call back at a specified time.

## Record Order Details

Once a customer has been selected, the application will enter the appropriate style of order entry:

- 1 - [Telesales](#)
- 2 - [Planned delivery](#)
- 3 - [Telemarketing](#)

The top part of the window contains key customer information, including contact name and extension number. The left-hand side of the window contains the item identification. For each item, the [Telesales](#) function creates a 30-character identifier made up of item number and description as required. Order details are entered in a column; either order quantity or current stock level in the case of [Planned Delivery](#).

On the right-hand side is previous order data for [Telesales](#), average order information for [Planned Delivery](#) or price and discount data. Functions toggle between the Price/Discount and History/Average window and back. These windows enable order details to be entered extremely quickly; therefore pressing **Enter** normally displays the next window.

At the end of the item windows the application presents a summary which:

- Displays the details of the order lines taken  
In the case of [planned delivery](#) it will include the calculated order quantity.
- Displays the price and discount
- Allows the entry of additional items
- Performs a credit check
- Demands entry of customer order entry reference
- Quotes the order number
- Allows additional charges to be appended to the order
- Allows entry of order date and due delivery date for the order
- Tests the free stock to confirm despatch can be made
- Provides for confirmation of the next call details

You can display [buying lists](#), including the description of the list, e.g. Small Electrical Wholesalers - Brown Goods. These lists are not static - they might contain those items which should be pushed to a particular market sector today.

## Create Sales Orders

Recording order details updates an order work file. The data in this work file is used to create the information required to allow allocation, picking and despatch to be handled by standard Sales Order Processing functions.

This exists in the [Telesales](#) sub-system, is activated by the ending of a call and creates an order within a few minutes.

## Work Planning

[Telesales](#) displays the work to be done by operator by day, in bar chart form. This includes the standard rest period. This enquiry enables class three operators to re-plan work.

## Performance Analysis

If enabled in your company profile, performance statistics are recorded. The elapsed time for each stage of the order taking cycle and the number of lines taken is recorded. The Performance Analysis report then gives operator performance information at summary or detail level between ranges of dates.

## Preparing to Use Telesales

Setting up [Telesales](#) requires careful planning and preparation. Your existing [Telesales](#) procedures and data need to be transferred to the application. Consideration should also be given to improvements which could be made to current procedures by making full use of the capabilities of [Telesales](#).

When [Telesales](#) is installed, four major areas must be considered.

- Have the prerequisite applications been installed and if so, are they set up in a way which is suitable for the operation of [Telesales](#)?
- How will the functions and facilities of [Telesales](#) be used to enhance the selling task of the company?
- Has the operation of [Telesales](#) been discussed with customers?
- Have the operators of the application had adequate education?

## Links to Applications

[Telesales](#) relies heavily on data held in other applications and its objective is to generate orders in a standard form within Sales Order Processing. Sales Order Processing must be installed with all its prerequisites and conditions satisfied.

The two-character company code in [Telesales](#) identifies the Sales Order Processing, Inventory Management, Accounts Receivable and Sales Analysis company to which it is linked.

A number of [Telesales](#) functions depend directly on data held in other applications. These are:

- Previous Order History data can be displayed to the operator. This is extracted from the Sales Order Processing database.
- Pricing and discounting information used in [Telesales](#) is retrieved from Sales Order Processing.

- Customer information such as supplying depot, price list, discount list and currency is retrieved from Sales Order Processing.
- Stock levels used in sourcing and availability checks are from the Inventory Management application.
- Data from Sales Analysis is used to calculate average weekly sales.

## How Will the Telesales Application be Used?

[Telesales](#) is designed to record order requirements quickly, while talking to a customer. To achieve this, a pre-agreed list of items is displayed to the operator to offer to the customer, the only entry required being the order quantity. [Telesales](#) allows three variations on this basic theme. These methods should be fully understood so that the appropriate technique can be used with each customer. The following questions should be asked:

- Which style of [telesales](#) will be used for each customer?
- Will standard [buying lists](#) be created or will they be customer specific?
- Will operators work in small groups on a list of customers or will they each have their own customer list?
- Will the application be used to time and record the performance of each operator?

## Discussion with Customers

In order to gain the maximum benefit from [Telesales](#), customers should understand the nature of the dialogue you plan to have with them. They should understand you intend to sell from a list and should perhaps have a copy of the list. If you are using [Planned Delivery](#) with them, they must understand they are expected to give current stock levels and must have complete confidence in the re-order level algorithm used.

## Are the Operators Trained?

As [Telesales](#) will directly affect your relationships with your customers, the only change they should see is improvement. It is imperative that operators are trained to use the application.

It is both practical and desirable to introduce a pilot scheme with a small number of carefully selected customers.

## Basic Data

Having decided how you will use [Telesales](#) in conjunction with other applications and the companies you will use, you need to plan and implement the setting up of the additional data required. The main elements you need to create are:

- Company Profile
- [Operator Profiles](#)
- [Buying Lists](#)
- [Customer Contacts](#)
- [Call Profiles](#)
- [Promotions](#)
- Reason Codes

## Company Profile

The [Telesales](#) application will make use of information held in the Sales Order Processing and Inventory company profiles. Additional information is also required.

Defaults for the operation of [Telesales](#):

- Type of order ([telesales](#), [telemarketing](#), [planned delivery](#))
- [Buying list](#)
- Time of pricing
- Stock availability check
- Names to be used in dates, e.g. January, February etc. and Monday, Tuesday etc.
- Formatting at the order line entry window
- Controlling the logic to decide on the next call to be taken

## Operator Profiles

In many [Telesales](#) operations an operator owns a number of customers so that a rapport may be established. It is possible to define operators to the system so that when they choose to start making calls their list is displayed to them. This can be extended so that a group of operators own a list of customers. The operator can have the authority to make a decision about their workload and the sequence in which calls are to be taken.



## Buying Lists

A [buying list](#) is the list of items to be discussed with the customer during a call. It can be a short customer-specific list or the full catalogue of the company's range. Care must be taken to ensure that most of the items required will be on the list; however, if the catalogue approach is used, the preparation of the [call list](#) may be protracted.

## Customer Contacts

In order that the sales call can be most effective, it should be made to a previously agreed, named individual or contact. Text can be added to the basic details to aid the reinforcement of the relationship.

## Call Profiles

The [Call Profile](#) records that a named individual in your company should telephone a named individual at the customer to discuss a list of items. This call should be made at previously agreed dates and times to record their requirements by either taking order quantities or the current stock levels. There are a number of points to watch carefully:

- The calls must be smoothed over the week and day as much as possible.
- Calls must be spread evenly between operators over the course of the day.
- All operators should have a number of untimed calls to fill in the blank times.
- A customer can have more than one [call profile](#) to discuss different lists, or to allow for call patterns which are not based just on a weekly cycle.

## Promotions

In general, [promotions](#) advise or act as a reminder except when an item substitution is made. In this case, the promoted item will be substituted if the [promotion](#) option is taken. Care must be taken when analysing sales of the base item and the substituted item.

## Reason Codes

Two-character reason codes can be set up to help analyse the reason for failed calls. Care should be taken to restrict the number to help operators.

## Initial Data Take On

Once the additional data has been set up, you are ready to use the application to receive calls and record orders using [Telesales](#). In order to make outgoing calls, run the Generate [Call Lists](#) task. This builds the list of calls to make and create a rapid reference database of the previous orders for the items on the [buying list](#) for the required customers. This can be a very large task if there are:

- A large number of customers
- A large number of lines on the [buying lists](#)
- A large number of weeks history required

In general the product of:

- Customers
- [Buying list](#) lines
- Number of weeks' orders

gives the number of order lines to be built into the history. It is estimated that this could be done at about 25,000 per hour although this will vary, depending upon machine size and other activity.

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## Chapter 2 Maintenance

### Maintaining Telesales

As [Telesales](#) is an advanced application, much of the primary data has already been set up as part of the base system implementation. You can add additional information to obtain the maximum benefit from [Telesales](#).

### Operator Profiles [1/TSM]

You can use this task to define a profile record for every operator who uses [Telesales](#).

The profile contains information used in the management of the operator's authority and in work planning windows.

### Operator Profiles Select Window

To display this window select the [Operator Profiles](#) task.

Use this window to create new operators or amend existing ones. You can also maintain extended text for any existing operator.

#### **Fields**

##### **Select (Untitled)**

Enter one of the following:

- 1 - To maintain the operator using the [Operator Profiles](#) Maintain window
- 2 - To enter extended text for the operator using the standard text window

### **Enter New or Existing Operator Code**

Enter the operator you want to maintain or, to create a new [telesales](#) operator, enter a new four-character code.

Enter the operator and then press Enter to display the [Operator Profiles](#) Maintain window.

## Operator Profiles Maintain Window

To display this window, enter the operator and then press Enter on the [Operator Profile](#) Select window.

Use this window to maintain the [operator profile](#) details for the selected operator.

### Fields

#### **Operator Name**

Enter the operator name, using up to 32 characters.

#### **Operator Extension Number**

Enter an extension number for auto dialling.

#### **Associated User Profile ID**

Enter the operator's user ID. To use group [call lists](#), enter \*GROUP.

#### **Call List Security Class**

Enter the authority level as follows:

- 0 - To specify that this operator can only take the call indicated by [Telesales](#)
- 1 - To specify that this operator can select any call on their [call list](#)
- 2 - To specify that this operator can change the time and date of any call on their list
- 3 - To specify that this operator can change the time, date and operator of any call on any [call list](#)

This defaults to the lowest authority level.

**Note:** *The rest of the fields on this window are intended for use in work planning.*

#### **Hours in Working Day**

Enter the average number of hours this operator works on [Telesales](#), in the range 0.0 to 24.0. If you leave this field blank, the company profile default is used.

#### **Normal Call Duration**

Enter the average time, in minutes, taken for a customer call, in the range 0 to 999. If you leave this field blank, the company profile default is used.

**Rest Period per Hour**

Enter the rest time each hour, in minutes, for this operator, in the range 0 to 15. If you leave this field blank, the company profile default is used.

**Telesales Proficient**

Enter one of the following:

0 - If the operator is not [Telesales](#) proficient

1 - If the operator is [Telesales](#) proficient

**Planned Delivery Proficient**

Enter one of the following:

0 - If the operator is not proficient in the use of [Planned Delivery](#)

1 - If the operator is proficient in the use of [Planned Delivery](#)

**Telemarketing Proficient**

Enter one of the following:

0 - If the operator is not [Telemarketing](#) proficient

1 - If the operator is [Telemarketing](#) proficient

Press Enter to validate the entered information and then select **Update (F8)** to save it and return to the [Operator Profiles](#) Select window.

## Buying Lists [2/TSM]

You use this task to create and amend [buying lists](#).

A [buying list](#) is a list of items that is displayed as a single window during order entry.

To make a discussion with a customer as productive as possible, you should always try to direct the discussion towards the specified [buying list](#).

## Buying List Select Window

To display this window the select [Buying Lists](#) task.

Use this window to create, amend or maintain [buying lists](#). You can also enter extended text for [buying lists](#).

**Fields****Select (Untitled)**

Enter one of the following:

- 1 - To maintain the [buying list](#) using the [Buying Lists](#) Maintain window
- 2 - To enter extended text for the selected [buying list](#)

### Enter New or Existing Buying List Code

Enter the [buying list](#) you want to maintain, or to create a new [buying list](#), enter a new four-character code.

Enter a [buying list](#) and then press Enter to display the [Buying Lists](#) Maintain window.

## Buying Lists Maintain Window

To display this window, enter a [buying list](#) and then press Enter on the [Buying Lists](#) Select window.

Use this window to enter the items included on the [buying list](#). You can create and amend up to 999 windows within one [buying list](#), with 12 items on each window.

### Fields

#### Description

Enter a description of the [buying list](#).

#### Item Code

Enter an item. There must be at least one item on a window.

#### Buying List Item Description

Enter the item description to display on the [buying list](#). [Telesales](#) generates the default by concatenating the item code and the Inventory item description, using the number and position of the characters defined in the company profile.

### Functions

#### Copy Panel (F13)

Use this to copy items from an existing [buying list](#) onto the [buying list](#) you are creating. Two additional fields are displayed at the bottom of the window. Specify the [buying list](#) you want to copy from, and where on the new list you want to insert the items. The [Buying List](#) Copy Item Select window is then displayed.

**Note:** *If you want to add items from line 1 of your list, enter 0 in the Insert After field. There must be at least one free line in order to add items to the window.*

#### Text (F21)

Use this to maintain the text for the [buying list](#).

Press Enter to validate the information and generate the standard [Buying List](#) Item Description, if you have not entered a description. Then select **Update (F8)** to save the details and return to the [Buying List](#) Select window.

## Buying List Copy Item Select Window

To display this window, select **Copy Panel (F13)**, specify the list you want to copy and then press Enter on the [Buying List](#) Maintain window.

Use this window to specify which items you want to copy on to the new [buying list](#).

**Note:** You can use *Page Up* and *Page Down* to view the list of items.

### **Fields**

#### **Select (Untitled)**

Enter **1** alongside each item you want to copy.

[Telesales](#) displays any items you select on the window after checking to make sure there is enough free space.

Press Enter to return to the [Buying Lists](#) Maintain window.

## Customer Contacts [3/TSM]

Use this task to specify a number of contacts at the customer's site, and record additional information to help the [Telesales](#) operator.

## Customer Contacts Customer Select Window

To display this window select the [Customer Contacts](#) task.

Use this window to select the customer and delivery address combination for which you want to maintain contacts.

### **Fields**

#### **Customer Account Code**

Enter a customer account code.

#### **Delivery Address Sequence**

Enter the sequence number for the customer's delivery address.

Press Enter to display the [Customer Contacts](#) Select window.



## Customer Contacts Select Window

To display this window, enter a customer and delivery address and then press Enter on the [Customer Contacts](#) Customer Select window.

Use this window to select the contact you want to maintain. You can also add new contacts, and enter text for each contact.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 1 - To maintain the contact using the [Customer Contacts](#) Maintain window
- 2 - To enter text for the selected contact

### **Functions**

#### **Add New Contact (F10)**

Use this to add a new contact using the [Customer Contacts](#) Maintain window.

Select a contact to display the [Customer Contacts](#) Maintain window.

## Customer Contacts Maintain Window

To display this window, select an existing contact on the [Customer Contacts](#) Select window on the [Customer Contacts](#) Select window.

Alternatively, select **Add New Contact (F10)** on the [Customer Contacts](#) Select window.

Use this window to enter details for the selected contact.

### **Fields**

#### **Contact Name**

Enter a contact name using up to 24 characters.

#### **Contact Title**

Enter the job title of the contact in the customer's company.

#### **Correspondence Name**

Enter the name or title to use on mail to the company.

#### **Extension Number**

Enter the telephone extension number of the contact.

#### **General Comments**

Enter information about the company or contact that is useful to the sales order personnel. This is a free text field that is displayed during order taking.

## **Functions**

### **Text (F21)**

Use this to add text for the selected contact.

Press Enter to check the information and then select **Update (F8)** to save the information and return to the [Customer Contacts](#) Select window.

## Call Profiles [4/TSM]

Use this task to create or maintain [call profiles](#). The [call profile](#) sets up the pattern and frequency of the calls that sales operators make to customers.

For example, you can determine that you make a call every second Wednesday between 9.00am and 9.30am.

## Call Profile Customer Select

To display this window select the [Call Profiles](#) task.

Use this window to select the customer and delivery address combination for which you want to set up the [call profile](#).

### **Fields**

#### **Customer Account Code**

Select a customer account code.

#### **Delivery Address Seq**

Enter the sequence number for the customer's delivery address. For example, sequence 000 always refers to the customer's head office address.

Press Enter to validate the entries and display the [Call Profile](#) Select Profile window.

## Call Profile Select Profile Window

To display this window, select a Customer Account Code and a Delivery Address Sequence and then press Enter on the [Call Profile](#) Customer Select window.

You use this window to select a [call profile](#) for amendment, or to add a new [call profile](#).

### **Fields**

**Select (Untitled)**

Enter one of the following:

- 1 - To display the Customer [Call Profile](#) Maintain window for the selected profile
- 2 - To display the Extended Text window for the selected profile

**Note:** You can specify the information displayed in the rest of the fields on the Customer [Call Profile](#) Maintain window.

**Functions****Add New Profile (F10)**

Use this to display the Customer [Call Profile](#) Maintain window to add a new [call profile](#).

## Customer Call Profile Maintain Window

To display this window, select an existing [call profile](#) and then press Enter on the [Call Profile](#) Select Profile window.

Alternatively, select **Add New Profile (F10)** on the [Call Profile](#) Select Profile window.

Use this window to add or amend [call profile](#) details. If you have selected to maintain an existing profile, then this window displays the current details. You can amend all the fields.

**Note:** *If you selected Add New Profile (F10) on the [Call Profile](#) Select Profile window, no details are displayed.*

### **Fields**

#### **Telephone**

Enter the telephone number of the contact person.

#### **Telex**

Enter the customer's telex number.

#### **Fax**

Enter the customer's fax number.

#### **Primary Contact**

You can select **Select Contact (F15)** to select your main contact for this customer from a list of primary contacts. You can select **Primary Contact (F16)** to create and amend data for this field.

#### **Operator Code**

You must enter the code of the operator who will normally make this call.

#### **Buying List**

Enter the [buying list](#) that will normally be used as the basis for the telephone call.

If this field is left blank, this information will default from the company profile.

#### **Telesales Type**

Enter one of the following to specify the type of selling call you want to make for this profile:

- 1 - To display the order history on the Order Line Detail window
- 2 - To display the average order figure so that the operator can enter the current stock level
- 3 - To display the customer's current price and discount information on order taking

In this case, you can select the [buying list](#) while you are establishing contact.

#### **No. of Weeks Cover**

Enter the number of weeks' stock cover. [Telesales](#) uses this to calculate the required order quantity for planned deliveries. [Telesales](#) uses historic data to calculate the average week's usage. This is then multiplied by the number of weeks of cover you specify in this field to

calculate the required stock level. If this is less than the actual stock, the difference becomes the recommended order quantity.

### **Length of Order History**

This field dictates the length of order history that you can view during order entry and calculation of [planned delivery](#) quantities.

### **Call Mask**

There are seven fields, one for each day of the week. Each field is identified by the initial letter of the day, running from Monday to Sunday.

Enter **1** to make sure that a call is made on a specific day. You can plan up to seven calls in any week, one for each day.

### **Call Frequency**

Enter the number of weeks that you want to elapse before [Telesales](#) repeats the call mask.

**Note:** You can use the Call Mask and Call Frequency fields to plan calls from once a day to once a year.

**Note:** You can set up additional [call profiles](#) to cater for different cyclic patterns for different item groups.

### **Call Between**

There are four sets of two fields used to determine the target time windows for the [call profile](#).

If you want to make the call at a specific time, only use the first of a pair of time fields. The first field is for the start time of a call and this must be earlier than the second.

The format for these fields is the 24-hour clock, HHMM.

You can enter pairs of times in any sequence but they must not overlap.

Leave these fields blank if you can make the call at any time of the day.

### **Next Call Date and Next Call Time**

You can enter these on the maintenance window, or they can be automatically calculated by the Next [Call List](#) Generation, or they can be agreed at the end of an order taking cycle.

## **Functions**

### **Select Contact (F15)**

Use this to display the [Customer Contact](#) Selection pop-up so that you can select the primary contact.

### **Primary Contact (F16)**

Use this to display the [Customer Contacts](#) Select window so that you can create or amend and then select the primary contact.

### **Maintain Contacts (F17)**

Use this to display the [Customer Contacts](#) Select window so that you can create or amend the list of contacts.

### **Text (F21)**

Use this to create or amend additional text for the selected [call profile](#).

Press Enter to validate your entries and then select **Update (F8)** to save any changes.

## Customer Contact Selection Pop-up

To display this pop-up, select **Select Contact (F15)** on the Customer [Call Profile](#) Maintain window.

Use this pop-up to select another contact for this [call profile](#).

### **Fields**

#### **Select (Untitled)**

Enter **1** to select the [customer contact](#) for your [call profile](#).

Press Enter to confirm your choice and re-display the Customer [Call Profile](#) Maintain window.

## Delivery Profiles [5/TSM]

To win and keep customers, companies need to demonstrate that their level of service improves. Ideally you should make sure that the [Telesales](#) order is followed by rapid delivery of the goods. You can link the [Telesales](#) order to the next expected delivery in the customer's area. You can use the [Delivery Profiles](#) to create information concerning the customer's preferred delivery requirements.

## Delivery Profiles Customer Select

To display this window select the [Delivery Profiles](#) task.

Use this window to select the customer and delivery address combination whose [delivery profile](#) you want to create or amend.

### **Fields**

#### **Customer Account Code**

Select a customer account code.

#### **Delivery Address Seq**

Enter the sequence number for the customer's delivery address.

Press Enter to validate your entries and display the [Delivery Profiles](#) Maintain window.

## Delivery Profiles Maintain Window

To display this window, select a customer account code and delivery address sequence and then press Enter on the [Delivery Profiles](#) Selection window.

This window displays the current details of the [delivery profile](#). You can create and amend all of the fields shown.

### **Fields**

#### **Telephone**

Enter the telephone number of the contact person.

#### **Telex**

Enter the customer's telex number.

#### **Fax**

Enter the customer's fax number.

#### **Primary Contact**

Select **Select Contact (F15)** to select from a list of primary contacts. **Primary Contacts (F16)** allows you to create and amend data for this field.

#### **Delivery Mask**

There are seven fields, one for each day of the week. Each field is identified by the initial letter of the day, from Monday to Sunday.

Enter **1** to make sure that a delivery is made on a specific day. You can plan up to seven deliveries in any week, one for each day.

#### **Delivery Frequency**

Enter the number of weeks that you want to elapse before [Telesales](#) repeats the delivery mask.

**Note:** You can use the *Delivery Mask* and *Delivery Frequency* fields to plan delivery from once a day to once a year.

#### **Deliver Between**

You can use four sets of two fields to determine the target time windows for the [delivery profile](#).

If you want to make the delivery at a specific time, only use the first of a pair of time fields. The first entry records the start time of a delivery and must be earlier than the second.

The format for these fields is the 24-hour clock, HHMM.

You can enter pairs of times in any sequence but they must not overlap.

Leave these fields blank if you can make the delivery at any time of the day.

### **Next Delivery Date and Next Delivery Time**

Enter the next delivery date and delivery time for your customer.

### **Delivery Route**

Select the delivery area of the customer. These codes are defined in the Inventory Descriptions file. You can use this information to plan a delivery journey.

### **Route Sequence**

Use this field to determine the sequence of loads on a journey. You can use this to help you plan how to load your delivery van.

## **Functions**

### **Select Contact (F15)**

Use this to display the [Customer Contact](#) Selection pop-up so that you can select the primary contact.

### **Primary Contact (F16)**

Use this to display the [Customer Contacts](#) Select window so that you can create or amend and then select the primary contact.

### **Maintain Contacts (F17)**

Use this to display the [Customer Contacts](#) Select window so that you can create or amend the list of contacts.

### **Extended Text (F21)**

Use this to maintain additional text for the selected [delivery profile](#).

Press Enter to validate your entries and then select **Update (F8)** to save any changes.



## Sales Prompts [6/TSM]

You can use this task to create and maintain the [sales prompts](#) that are displayed at the top of windows during order processing.

**Note:** *You can use effectivity dates to control the appearance of these prompts.*

## Sales Prompts Select Window

To display this window select the [Sales Prompts](#) task.

You use this window to select the [sales prompts](#) and their effectivity dates that you want to amend.

### **Fields**

#### **Select (Untitled)**

Enter **1** to select the sales prompt you want to amend. This displays the [Sales Prompts](#) Maintain window.

#### **Enter Effective Date to Display From**

Use this to start the sales prompt display at a certain date. This is useful if you have a long list of [sales prompts](#) that you cannot view on one window.

#### **Date Effective At**

Enter the date on which this sales prompt becomes effective.

### **Functions**

#### **Add New Sales Prompt (F10)**

Use this to add a new sales prompt to the list.

Select the sales prompt you want to maintain to display the [Sales Prompts](#) Maintain window.

## Sales Prompts Maintain Window

To display this window, select the sales prompt that you want to maintain on the Sales Prompt Select window.

Alternatively, select **Add New Sales Prompt (F10)** on the [Sales Prompts](#) Select window.

You use this window to create and amend the details of the selected sales prompt.

**Note:** *If you are creating a new sales prompt, New Sales Prompt is displayed at the top of the window.*

### **Fields**

### **Effective From Date**

You must enter the date from which you want to display the prompt.

### **Effective To Date**

You must enter the date until which you want to display the prompt.

**Note:** Enter the dates in the format DDMMYYYY.

### **Text**

You must enter the text that you want to use as the sales prompt.

Press Enter to validate the information you have entered and then select **Update (F8)** to save the details.

## Promotions [7/TSM]

You can use this task to record and display details of current [promotions](#). You can record a [promotion](#) that applies to a customer or group of customers, or an item, or both.

If you want to create a [promotion](#) for a specific item you can define it as a [promotion](#) item. This [promotion](#) item is substituted for the base item if the [promotion](#) is accepted at order entry. The [promotion](#) item is automatically included in the generic [item family](#) of the base item.

## Promotions Select Window

To display this window select the [Promotions](#) task.

Use this window to create new [promotions](#) and amend existing ones.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 1 - To amend an existing [promotion](#)
- 2 - To create or maintain any additional text for this [promotion](#)

#### **Enter New or Existing Promotion No**

Enter an existing [promotion](#) number to display its details.

Alternatively, enter a new number if you want to create a new [promotion](#).

#### **Effective Date to Display From**

Enter the date from which the [promotion](#) will take effect.

**Date Effective At**

Enter a date to display all [promotions](#) effective at that date.

Press Enter to validate the information you have entered and display the [Promotions](#) Maintain window.

## Promotions Maintain Window

To display this window, press Enter on the [Promotions](#) Select window.

*Note: The window is the same whether you are maintaining an existing [promotion](#) or creating a new one.*

There are three main areas on the window. You use the first to name and classify the [promotion](#). Use the second to define the base and [promotion](#) items and the relationship between them. Use the third to qualify customer related constraints.

**Fields****Promotion No.**

This field displays the [promotion](#) number that you specified on the [Promotions](#) Select window.

If you are creating a new [promotion](#), the words "New [Promotion](#)" are displayed.

If you are amending an existing [promotion](#), the words "Existing [Promotion](#)" are displayed.

**Effective From Date**

You must enter the date on which the [promotion](#) starts.

**Effective To Date**

You must enter the date on which the [promotion](#) ends.

**Caption**

You must enter the name of the [promotion](#).

**Promotion Type**

You can also select a [promotion](#) type code from those defined in the Inventory Descriptions file.

**Promotion Target**

Enter the percentage amount by which you want sales of this item to increase. If it is present, the target order quantity is increased by this percentage for information purposes.

**Base Item**

Enter the item (or generic [item family](#)) that you want to promote.

**Promotion Item**

Enter the item that you want to use as a substitute for the base item.

### **Per Factor**

Enter the number of [promotion](#) items that you want to use as a substitute for a single base item. The default is 1.

### **Customer Account**

Enter a customer account to apply the [promotion](#) to a single customer.

### **Customer Class**

Enter a customer class to apply the [promotion](#) to a customer class.

### **Price List**

Enter the price list for this [promotion](#).

### **Discount List**

Enter the discount list for this [promotion](#).

**Note:** Select **More Constraints (F13)** to display the following additional constraints:

### **Corporation**

Enter the corporation code to which you want to apply this [promotion](#).

### **Branch**

Enter the branch code to which you want to apply this [promotion](#).

### **Region**

Enter the region code to which you want to apply this [promotion](#).

### **State**

Enter the state code to which you want to apply this [promotion](#).

### **Territory**

Enter the territory code to which you want to apply this [promotion](#).

### **Division**

Enter the division code to which you want to apply this [promotion](#).

### **Sub-Division**

Enter the sub-division code to which you want to apply this [promotion](#).

## **Functions**

### **More Constraints (F13)**

Use this to display further constraints.

### **Text (F21)**

Use this to maintain additional text for the [promotion](#).

Select **Update (F8)** to record the details of the [promotion](#) together with the specified constraints.

If you have defined a [promotion](#) item, the [item family](#) relations are checked. If no relationship exists, one is created starting on the start date of the [promotion](#).

## Item Families [8/TSM]

Items are often promoted using [promotion](#) packs. As you need to be able to apply full stock control over your items, you would normally assign a different item number to the [promotion](#) pack. This can distort the information that you record for sales analysis.

This is particularly significant if you use [Planned Delivery telesales](#). In this case, you use sales analysis data in conjunction with certain control parameters to determine the recommended stock levels for the customer. It is therefore necessary to link [promotional](#) items to their base items so that you can consider the total sales of an item together. You can do this using this task.

**Note:** A product family comprises of one base item and any number of [promotional](#) items.

## Product Families Base Item Select Window

To display this window, select the Item Families task.

You use this window to create and amend item families.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 1 - To select an existing base item for amendment
- 2 - To add any additional text to the item

#### **New or Existing Base Item Code**

Enter the item code of the base item for which you want to set up an [item family](#).

You can also use this field to select a base item whose code is not displayed if you have a list that does not fit on one window.

This item must have already been defined to Inventory.

Enter an item code and then press Enter to display the Product Families [Promotion](#) Item Select window.

## Product Families Promotion Item Select Window

To display this window, select an item and then press Enter on the Product Families Base Item Select window.

You can use this window to select a [promotional](#) item for amendment or to add new [promotional](#) items to your selected base item.

This window displays any existing [promotional](#) items for an [item family](#). The top of the window displays the base item and the bottom of the window displays a list of the [promotion](#) items. It also shows the time to include in the calculation for [planned delivery](#).

### **Fields**

#### **Select (Untitled)**

Enter **1** to select an existing [promotional](#) item for amendment.

#### **New or Existing Promotion Item Code**

Enter the item code of the [promotional](#) item that you want to add to this [item family](#).

You can also use this field to select a [promotional](#) item whose code is not displayed if you have a list that does not fit on one window.

This item must have already been defined to Inventory.

### **Functions**

#### **Text (F21)**

Use this to add additional text to your selected [item family](#).

Select an item code and then press Enter to display the Product Families Maintain window.

## Product Families Maintain Window

To display this window, select an item code and then press Enter on the Product Families [Promotion](#) Item Select window.

Use this window to maintain details of the relationship between the [promotion](#) item and the [item family](#).

The base item and the [promotional](#) item are displayed followed by any current details of the relationship.

### **Fields**

#### **Effective From Date**

You must enter the first date on which you want to include this [promotion](#) item within the [item family](#).

**Effective To Date**

You must enter the date after which this [promotional](#) item will not be included within the [item family](#).

**Per Factor**

Enter the number of [promotion](#) items that you need to make one base item. The default value is 1.

Press Enter to validate any changes made. If no error conditions are detected. Select **Update (F8)**. If an error is found, the field is highlighted and a message is displayed.

## Reason Descriptions [9/TSM]

You use this task to create codes and descriptions used within [Telesales](#) to help you evaluate operations. For example, you need to specify a reason code when an operator's call is rescheduled, aborted, or when the operator has changed.

## Reason Codes Select Window

To display this window select the Reason Descriptions task.

Use this window to create and amend reason codes.

**Select (Untitled)**

Enter **1** to select the existing reason code that you want to amend.

**Enter New or Existing Reason Code**

Use this field to select an existing reason code that is not displayed on the window because the list of codes is too big to fit on the window.

Alternatively, use this field to create a new reason code, using up to two characters.

Select a reason code and then press Enter to display the Reason Codes Maintain window.

## Reason Codes Maintain Window

To display this window, select a reason code and then press Enter on the Reason Codes Select window.

Use this window to create or maintain the details of your specified reason code.

**Fields**

### **Reason Description**

You must enter the text to describe the reason code, using up to 15 characters.

### **Functions**

#### **Delete (F11)**

Use this to delete a reason code. Select it twice to process the deletion.

Press Enter to validate the information you have entered and then select **Update (F8)** to update the entry and return to the Reason Codes Select window.



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## Chapter 3 Processing

### Telesales Processing Introduction

[Telesales](#) is a support environment for the sales operator. You can use it for simple and rapid access to data, so that you can answer questions as they arise.

To achieve this you must:

- Anticipate the nature of the orders to be taken
- Anticipate areas of concern to the customer

[Telesales](#) uses [call lists](#) to:

- Extract order history data
- Identify the relevant prices and discount lists
- Calculate average order and recommended stocks

When a sales operator records an order the details are written to a [Telesales](#) database, and these detail the optimal response time. At the end of the order these details are automatically transferred to the sales order system for picking and despatch.

### Generate Call Lists [31/TSP]

Use this task to prepare the [call list](#) up to a nominated date and to generate all of the supporting information. You would normally generate [call lists](#) once a day, but they can be generated more or less often.

### Call List Generation Window

To display this window, select the Generate [Call Lists](#) task.

The window displays the data that was entered in the previous [Call List](#) Generation, together with the standard defaults from the company profile.

There are three columns of input fields, one each for [Telesales](#), [Planned Delivery](#) and [Telemarketing](#). Using the date and parameters available, you can generate the [call list](#) for any combination of order types. Any previously defined standard defaults are displayed in the Default column on the left.

### **Fields**

#### **Remove Calls Before**

You must enter the date before which previously generated calls are removed. All calls before this date are deleted irrespective of their status (unless the call is currently in progress).

#### **Add Calls To**

You must enter a date in this field to add calls with a next call date equal to or before that date to the [call list](#).

[Telesales](#) reviews all [call profiles](#) to make sure that they have a next call date. If a next call date is not found, it calculates one based on the [call profile](#).

[Telesales](#) performs a validation check to make sure the call is not already present on the [call list](#).

**Note:** *You can specify different Before and To dates for each of the three order methods.*

#### **Pricing Overnight**

You can extract the normal price list and discount list details to speed interactive processing.

However, you can gain the maximum advantage if you limit this processing to [Telesales](#) and [Planned Delivery](#), particularly if there is a high probability of the [buying list](#) changing for [Telemarketing](#).

Enter one of the following:

0 - To process pricing interactively

1 - To process pricing overnight

#### **Default Buying List**

You must specify a default [buying list](#). This is used as a basis for the preparatory work. This list is used if you have not specified one for the [call profile](#).

#### **No. of Previous Orders**

Enter a value between 0 and 13 to specify the number of previous orders per customer that [Telesales](#) analyses for order history and displays during order taking.

**Note:** *The greater the number of orders specified, the longer analysis will take.*

#### **Orders by Date/Week**

Enter one of the following:

- 1 - To display the order history by date
- 2 - To display the order history by week

### **Order Date Format**

If you have specified that you want to display order history by date, enter one of the following to specify the date format:

- 1 - For a format of dd/mm/yyyy
- 2 - For a format of ddmm yyyy
- 3 - For a format of mm ddyyyy

### **Calc. Recommended Stocks**

If you use [Planned Delivery](#), enter one of the following:

- 0 - Not to calculate the recommended stock for a customer using the history data
- 1 - To calculate the recommended stock for a customer using the history data

Press Enter to validate entries. Any errors will be highlighted. Then select **Submit (F8)** to process the [call list](#) generation.

## Manage Call Lists [22/TSP]

Use this task to review work that needs to be done and distributed amongst your available operators.

## Call Management Pause Window

To display this window, select the Manage [Call Lists](#) task

This warns the operator that after the first load of the day of the procedure, a re-organise routine is run.

[Telesales](#) displays the following message during the re-organise routine: "Operator workload being calculated".

Press Enter to display the [Call Management](#) Graph window.

## Call Management Graph Window

To display this window, press Enter on the [Call Management](#) Pause window.

This window displays the work that needs to be done by each operator in the format of a horizontal bar chart.

The operator codes are displayed on the left of the window. If there are more than 68 calls to be made, the horizontal axis is scaled to the appropriate size.

The following characters are used to indicate to nature of the calls:

-- Overdue Calls

# - Today's Calls

+ - Future Calls

### **Fields**

#### **Select (Untitled)**

Enter **1** to display the [Call Management](#) Call Action window for your selected operator.

#### **Operator**

This field displays the operator code for the current line of calls.

### **Functions**

#### **Summary (F13)**

Use this to display the [Call Management](#) Summary window.

Select an operator and then press Enter, or select **Summary (F13)** to display the next window.

## Call Management Summary Window

To display this window, select **Summary (F13)** on the [Call Management](#) Graph window.

Use this window to view a summary of the calls that need to be made by each operator.

### **Fields**

#### **Select (Untitled)**

Enter **1** to display the [Call Management](#) Call Action window.

### **Functions**

#### **Graph (F13)**

Use this to display the [Call Management](#) Graph window.

Select an operator and then press Enter, or select **Graph (F13)** to display the next window.

## Call Management Call Action Window

To display this window, select an operator and then press Enter on the [Call Management](#) Graph window.

Alternatively, select an operator and then press Enter on the [Call Management](#) Summary window.

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Use this window to view a list of the calls that need to be made by an operator, and to re-schedule and re-distribute the work.

The window displays the list of calls by time of call in date sequence. Untimed calls are displayed before timed calls.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 1 - To display the [Call Management](#) Spread pop-up.
- 2 - To display the [Call Management](#) Reschedule pop-up.
- 3 - To display the [Call Management](#) Change Operator pop-up.

When you select any of these options, [Telesales](#) checks the authority level of the operator. You can select as many actions as required and in any combination.

#### **Action**

If any action has been taken for any of the calls, mnemonic codes are displayed in this column as follows:

- \***SPRD** - Spread
- \***RSCHD** - Rescheduled
- \***OPCHG** - Operator changed

Press Enter to process the actions you have selected. When one selected action has been processed, the next selected action is presented.

## Call Management Spread Pop-up

To display this pop-up, enter 1 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to re-allocate a number of calls for one operator by spreading them over a number of other operators.

The pop-up displays a list of the number of calls that need to be spread, together with a list of operators.

You can then enter the number of calls to be spread to each operator. The totals of the calls you select must equal the number of calls to spread.

**Note:** *To spread calls amongst other operators, you must have an authority level of 3.*

### **Fields**

**Number of Calls**

Enter the number of calls that you want to allocate to each operator. The total number of calls you select must equal the total number of calls to spread.

**Operator Name**

This field displays the name of the operator to whom you can allocate calls.

Press Enter to save the details and re-display the [Call Management](#) Call Action window.

## Reschedule Call Pop-up

To display this pop-up, enter 2 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to re-schedule the selected calls to a later date. The pop-up displays the current target date and time and the call times that this contact prefers.

**Fields****Current Next Call Date**

This field displays the date of the next call for this customer.

**Current Next Call Time**

This field displays the time of the next call for this customer.

**Preferred Call Time**

This field displays the time window within which you should ideally process this call.

**New Date**

Enter the new call date.

**New Time**

Enter the new call time.

**Caution:** You cannot enter a new time and date that is in the past.

**Reason**

You must enter a reason code for the change. These are defined in the Inventory Descriptions file.

Press Enter to update both the time and date details for the call and re-display the [Call Management](#) Call Action window.

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## Change Operator Pop-up

To display this pop-up, enter 3 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to change the operator who is responsible for making a selected call.

### **Fields**

#### **Select (Untitled)**

Enter **1** to re-allocate the call to the selected operator.

Press Enter to re-allocate the call and re-display the [Call Management](#) Call Action window.

## Outgoing Calls [1/TSP]

This task provides, in a single procedure, all of the information and support required by sales operators when they make calls.

You can:

- Select a call
- Establish contact
- Enter order item detail
- Add additional items and charges
- Close the order

New orders cannot be raised if the delivery address or account has a status of I (Inactive).

**Note:** *An inactive account in a customer hierarchy has no effect on its child accounts.*

**Note:** *Use Order Capture to place orders for bonded customers.*

**Note:** *Calls cannot be taken for bonded customers.*

This task has been designed to provide the best response time while your operator is recording the order line details, so that it minimises any inconvenience to the customer.

If you need a group of operators to work as a team, then you should do the following to achieve this:

- Set up each of the operators in their own right.
- Set up each call group as an operator.
- When you generate a [call list](#), [Telesales](#) selects one of the call groups as the preferred operator.

- When a call group operator signs on they will have no calls displayed. Select **Select List (F19)** to select their assigned call group.
- You can have more than one operator active on a list at one time.
- [Telesales](#) records the target operator, call group and the actual operator (the person who made the call) for historical purposes.

## Call Selection Window

To display this window select the Outgoing Calls task.

Call Selection allocates calls to the operator. You can make calls on a specific day and at a nominated time.

The upper half of the window displays timed calls and the lower half displays untimed calls.

The timed calls are sequenced by date and time and the untimed calls are sequenced by date.

Once you have selected a call, the scheduling program promotes the next call to the top of the window.

The top of the window also displays a sales prompt; this changes each time the window is changed.

**Caution:** Calls cannot be taken for bonded customers.

### Fields

#### **Call Selection Operator**

This field displays the name of the operator whose list is being displayed. This is normally the operator who has selected this option.

**Note:** *If you have the correct authority, you can display the [call list](#) of any other operator. In this case, the name displayed is the name of operator whose [call list](#) is being displayed.*

#### **Next Call**

This is the next call that [Telesales](#) has determined should be made. This is reconsidered every five minutes, or when a call is scheduled or a change is made to the list of calls to be made.

**Note:** *An asterisk is displayed alongside the next call to be taken.*

#### **Select 1 (Untitled)**

Enter one of the following:

1 - To select the call and display the Establish Contact window showing the data from the selected [call profile](#)

2 - The operator's authority is checked and then the Reschedule Call pop-up is displayed, allowing new times or dates to be entered.



3 - The operator's authority is checked and then the Change Operator pop-up is displayed, allowing a new operator to be selected.

4 - The operator's authority is checked and then the Abort Call pop-up is displayed. To abort a call you must enter a reason code.

**Note:** *Calls cannot be processed for bonded customers.*

### **Call Status Code (Untitled)**

This field displays a call status code as follows:

Blank - The call is due to be made today.

> - The call is planned in the future.

R - The call has been rescheduled from the original call date or time.

C - The call has been changed from one operator to another.

### **Functions**

#### **Prompt (F4)**

Position the cursor on a [call list](#) entry and use this to display the Call Action pop-up. This pop-up contains a list of the actions taken for that call.

This is particularly useful if you can see that the call has been re-scheduled (R is displayed next to the call date), or changed from one operator to another (C is displayed next to the call date). You can select an action to view more information; this provides details of the change.

#### **Sales Prompts (F13)**

Use this to display a list of the current [sales prompts](#) in a pop-up.

#### **Select List (F19)**

Use this to display a list of current operators; you can work on a copy of their list.

#### **Incoming Call (F22)**

This provides direct access to accept incoming calls. Exiting from incoming calls after completion will return you to the Call Selection window.

Select an option and then press Enter to display the next window.

## Establish Contact Window

To display this window, enter 1 against a customer and then press Enter on the Call Selection window.

To make the best use of the operator's time you must minimise the time taken to get to the right contact within your customer's organisation.

The type of call being made is displayed in the top right of the window as follows:

- [Telesales](#)
- [Planned Delivery](#)
- [Telemarketing](#)

The window is split into three areas. The first displays the customer details, including the [customer contact](#) and extension. The second displays the [buying list](#) for this customer. The third displays the Call Action field.

**Caution:** Calls cannot be sourced from a bonded warehouse.

## **Fields**

### **Buying List**

This field displays the name of the [buying list](#) that was used to form the basis of the preparation for the call.

### **Call List**

If you are processing a [Telemarketing](#) call, you can change this.

**Note:** The next two fields are displayed below the [Buying List](#) field.

### **Maintain Text**

The most recent additional text for the contact is displayed. You can add to this, or amend this before you continue with the order.

### **\*\* Warning**

If the customer has exceeded the credit limit or is on credit stop, [Telesales](#) displays a warning message. You can still take the order but [Telesales](#) suspends it until further action is taken.

### **Call Action**

Enter one of the following:

2 - To display the Reschedule Call pop-up so that you can enter new times or dates

4 - To display the Abort Call pop-up with reason codes

Select a reason code to abort the call.

## **Functions**

### **Previous (F12)**

If you select this to return to the Call Selection window, the Reason Code pop-up is displayed. You must select a reason before you can return to the Call Selection window.

### **Select Contact (F19)**

Use this to display the Select Contact pop-up, so that you can ask for other known employees of the customer if your normal contact is not available.

If you select a different contact, that contact is automatically associated with this order.

### **Text (F21)**

Use this to maintain contact text.

### **Change List (F22)**

If you are processing a [Telemarketing](#) call, use this to display the Select [Buying List](#) pop-up so that you can change the list.

Press Enter to display the Enter Order Item Details window.

[Telesales](#) records the details of the order taking cycle agreed at this point, for example, the name of the actual contact and the actual [buying list](#) that you are using.

## Enter Order Item Details Window

To display this window, press Enter on the Establish Contact window.

Use this window to review an agreed [buying list](#) of items with a customer, and record the customer's requirements. There are two ways of doing this:

- In [Telesales](#) and [Telemarketing](#), enter the order quantity.
- In [Planned Delivery](#), enter the customer's current stock level.

**Note:** *If you use Catchweight, this window will calculate secondary values and UoMs.*

The type of call being made is displayed in the top right-hand corner of the window.

You can control the format of the centre area of the window using Presentation Design within Company Profile Maintenance.

Instances may arise where an item cannot be ordered. This is likely to be due to Customer Restrictions, Transaction Control or Supersession coming into effect.

### **Fields**

#### **Customer and Contact**

These fields display the customer, and the contact at that customer, who is responsible for this order.

#### **Go To Panel Number**

Enter the window number of the [buying list](#) you want to view.

#### **Promotion (P)**

If the item is being promoted, an asterisk (\*) is displayed on this line. Position the cursor on the line and then select **Prompt (F4)** to display the details of the [promotion](#); you can then enter a quantity against these details to add them to the order, if required.

**Qty**

The information you need to enter here depends on the type of call in progress.

Enter one of the following:

- The order quantity ([Telesales](#) and [Telemarketing](#))
- The customer's current stock ([Planned Delivery](#))
- Currency code and currency conversion details are also displayed if the customer is a currency customer.

**Functions****Prompt (F4)**

Use this to display details of current [promotions](#) for items marked with an asterisk (\*) in the **P** field. There are four kinds of information in this pop-up:

- 1 A summary of the type and details of the promotion is displayed.
- 2 If you have specified that a promotion item is sold in place of the standard item, for example, promotion packs, the item number is displayed together with the per factor.
- 3 The promotion text is displayed in this area.
- 4 You can enter the quantity to be ordered.

**Refresh (F5)**

Use this to re-display the original window with no changes.

**Add Item (F10)**

Use this to add an item to an order at any time during the order taking cycle. The Add an Item pop-up is displayed so that you can enter an item number and quantity. The required stock checking and pricing is performed during the order taking cycle.

**Actions (F13)**

Use this to display the Enter Order Item Details Actions pop-up, which displays the available actions for the information area.

**Customer's Stock (F18)**

This function is only available for [Planned Delivery](#). The quantity entered represents the customer's quoted stock position or the order quantity.

**Scroll Left (F19)/Scroll Right (F20)**

These are only displayed when the Previous Order Detail Information window is displayed. Use these to view information that is not displayed on the main area of the window.

**Close Order (F22)**

Use this to start the first phase of order close. You can use this to add and source non-standard items for this order.

Select a function to display the next window.

Alternatively, press Enter to select another item to include in the order.

## Add an Item Pop-up

To display this pop-up, select **Add Item (F10)** on the Enter Order Item Details window.

Use this pop-up to add a new item to the regular [call list](#) for your selected call.

### **Fields**

#### **Item Code**

Select the item that you want to add to your [call list](#) for this order. Instances may arise where an item cannot be added. This is likely to be due to Customer Restrictions, Transaction Control or Supersession coming into effect.

#### **Qty Reqd**

Enter the quantity that your customer requires.

Press Enter to validate the details you have entered.

Select **Update (F8)** to save the details and re-display the Enter Order Item Details window.

## Enter Order Item Details Actions Pop-up

To display this pop-up, select **Actions (F13)** on the Enter Order Item Details window.

Use this pop-up to view a list of available information areas on which to base your selection. These are either variants on the basic Enter Order Item Details window, or pop-up displayed on it.

#### **Select (Untitled)**

Enter **1** to select an action.

Enter 1 to select an action and then press Enter to continue. The window that is displayed depends on the action that you select.

## Actions - Display Pricing Detail Window

To display this window, enter 1 against the Display Pricing Detail action and then press Enter on the Enter Order Item Details Actions pop-up.

You can display the price and discount information for the customer and [buying list](#), if pricing has been requested either at generation of [call lists](#) or interactively. You can decide this when you create the Company Control record.

The price is retrieved from the price list defined on the customer's additional details. The discount earned is interactively calculated and is displayed, as the window is re-displayed. The unit of measure for the item is also displayed.

For more information about this window see the Enter Order Item Details Window section.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Line Values Window

To display this window, enter 1 against the Display Line Values action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this window to view the line values for your selected call.

The following fields are added to those already displayed on the Enter Order Item Details window.

### **Extended Value**

The price list and discount lists are used to derive the current extended line value. The calculation is: Value - (Quantity x Price) - Discount.

### **Prc.Lst**

This is the currency used by the price list.

### **Dis.List**

This is the currency used by the discount list.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Whole Order Details Pop-up

To display this pop-up, enter 1 against the Display Whole Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This pop-up displays the value of the order taken by the operator so far. If the whole order discount is given, the percentage discount earned is also displayed. In certain situations you can use this to raise the average value of orders taken, by informing the customer how much more needs to be spent to earn the next level of discount.

### **Fields**

#### **Order Value**

This field displays the value of the order to date, at item cost.

#### **Discount**

This field displays the discount given so far.

**Charges**

This field displays any additional charges that the order has accrued.

**Total Order**

This field displays the total value of the order so far, that is, the sum of the three fields above.

Two fields are displayed in the bottom half of the pop-up. These display the break points for achievable discounts.

**Order Value**

This field displays the value at which the discount shown in the Discount % field is applicable to the order.

**Discount %**

This field displays the percentage discount applicable at the order value shown in the associated Order Value field.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Previous Order Details Window

To display this window, enter 1 against the Display Previous Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This window displays the previous order details. You can tailor the display to the following information, using the company profile:

- You can display the orders by date, using a selected date format.
- You can control the number of orders you want to display, up to a maximum of 13.
- You can display the quantity ordered per week, rather than individual orders and dates if required.
- You can choose whether these quantities are the orders taken or the sales made.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Customer Promotions Pop-up

To display this pop-up, enter 1 against the Display Customer [Promotions](#) action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to display [promotions](#) for a specific customer or range of customers.

**Fields****Promotion Number**

This field displays the unique code for the [promotion](#).

**Caption**

This field displays the title of the [promotion](#).

**Type**

This field displays the [promotion](#) type. These are defined in the Inventory Descriptions file and specified using [Promotions](#).

**Target**

This field displays the percentage increase in sales projected for this [promotion](#).

**Effectivity**

These fields display the dates between which this [promotion](#) is available.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Sales Prompts Pop-up

To display this pop-up, enter 1 against the Display [Sales Prompts](#) action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to view a list of current [sales prompts](#).

## Actions - Retrieve Previous Orders Window

To display this window, enter 1 against the Retrieve Previous Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This window displays previous orders for your selected customer and [call profile](#).

The order quantities for the previous order are retrieved and entered into the current order.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Planned Delivery Detail Window

To display this window, enter 1 against the Display [Planned Delivery](#) Detail action and then press Enter on the Enter Order Item Details Actions pop-up.

This option is only available if the order is a [Planned Delivery](#) order. You can use these fields to assist in taking orders for the [Planned Delivery](#) system.

If you use [Planned Delivery](#), the customer quotes their existing stock level and this is used, in conjunction with the other information displayed on this window, to calculate the required quantity. During the generation of [call lists](#) [Telesales](#) calculates the average order quantity per week. This is



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multiplied by the number of weeks cover required to give the recommended stock. When you enter the customer's stock figure, the difference between the recommended stock and the customer's stock figure results in the quantity to be ordered.

### **Fields**

**Note:** The [Planned Delivery](#) Detail action displays the following fields on the Enter Order Item Details window:

#### **No. Weeks Cover**

This field displays the number of weeks' trading for which the customer wants to hold stock.

#### **Call Freq**

This field displays the frequency with which the customer is called.

#### **Rec. Stock**

This field displays the recommended stock quantity.

#### **Qty**

This field displays the quantity that needs to be ordered.

#### **Avg Ord Qty**

This field displays the average order quantity.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Additional Overrides Pop-up

To display this pop-up, enter 1 against the Additional Overrides action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to enter order overrides.

### **Fields**

#### **Priced Despatch Notes**

Enter one of the following:

0 - Not to print prices on despatch notes

1 - To print prices on despatch notes

#### **Type of Despatch Note**

Enter one of the following to determine whether to generate despatch notes and invoices separately, or produce a single combined document.

1 - For a separate despatch note and invoice

2 - For a combined document

**Invoice Consolidation**

Enter one of the following to determine how you want to consolidate invoices:

0 - By despatch note

1 - Daily

2 - Weekly

**Note:** *You can use this field if you have set the Type of Despatch Notes field to 1 to generate separate despatch notes and invoices.*

**Despatch Note Language**

Select the language in which you want to print despatch notes. This is validated against those defined to the Application Manager.

**Invoice Language**

Select the language in which you want to print invoices. This is validated against those defined to the Application Manager.

**Despatch Method**

Select the default despatch method. These are defined in the Inventory Descriptions file, under major type MODE.

**Transport Method**

Select the default transport method. These are defined in the Inventory Descriptions file, under major type TMTH.

**Reason for Despatch**

By default this field is blank. Any entry made is validated against the Inventory Descriptions file, major type MOVR.

**Terms of Delivery**

Select the default terms of delivery. These are defined in the Inventory Descriptions file, under major type TDEL.

**Note:** *If you use World Trade, this field will default to the value held on the Sales Order Processing Customer Maintenance Trade Details window.*

**Carrier**

This field displays the default carrier. This field is validated depending on any interfaced applications. The following checks are carried out in the following order:

If you use Advanced Shipping, and the processing company is active with Sales Order Processing, the carrier will default to that defined via Shipping Customer Defaults.

If you enter a new code, it is validated against the Shipping Names and Addresses file in Shipping Customer Defaults Maintenance.

If you use Transport Planning, and the processing company is active within Sales Order Processing, the carrier will default to the carrier defined to the Transport Planning [Delivery Profile](#).

If you enter a new code, it is validated against the Transport Planning Carrier file.

A Sales Order Processing company is defined to a Transport Planning company via an SOP company/stockroom combination.

If you do not use Advanced Shipping or Transport Planning, then the default is blank. Any entry made must be defined in the Inventory Descriptions file, under major type CARR.

### **Shipping Marks**

This is a free format field for shipping marks.

### **Functions**

#### **Customer Attributes (F13)**

Use this to view the Additional Overrides Customer Attributes pop-up.

Select **Update (F8)** to save any changes.

## Additional Overrides Customer Attributes Pop-up

To display this pop-up, select **Customer Attributes (F13)** on the Actions - Additional Overrides pop-up.

**Note:** *This is only available in Maintenance mode for authorised users.*

Use this pop-up to override default customer details.

### **Fields**

#### **Tax Calc Basis**

This field holds the customer's tax status for sales invoicing as follows:

- 1 - If the customer is tax exempt
- 2 - To use the tax code in the following field
- 3 - To use the tax code from the inventory item

**Note:** *If you use World Trade, you must set this to 3.*

**Tax Code**

This field displays the tax code applicable. You must specify a code if you have set the Tax Calc. Basis field to 2 or 3.

**Extra Rate Tax**

This field indicates whether an extra charge is applicable using the tax code defined.

**Tax Country**

This field displays the country code for the country in which this customer is registered for tax. If this is a delivery address, and the same country applies to the statement address, you do not need to re-enter the information.

Validation and prompting on this field depends on interfacing applications.

**Note:** *If you use World Trade, the system will default to the Customer Trading Details setting. You must enter a country code that is valid to World Trade.*

**Note:** *If you do not use World Trade, the country code is validated against the General Ledger.*

**Tax Registration**

This field displays the customer's tax registration number in the specified country.

**Note:** *If the General Ledger is live, tax registration will be validated according to a country-specific format based on the tax country code.*

**Fiscal Code**

This field displays the classification code assigned by the government to this customer. This defaults to the value from the Customer Additional Details.

**Salesman**

This field displays the default salesman for the customer. The codes are defined in the Inventory Descriptions file, under major type TN.

**Agent**

This field displays the default agent for the customer. The codes are defined in the Inventory Descriptions file, under major type AN.

**Sub Agent**

This field displays the default sub agent for the customer. The codes are defined in the Inventory Descriptions file, under major type AN.

**Region**

This field displays the default sales region for the customer. The codes are defined in the Inventory Descriptions file, under major type SN.

**State**

This field displays the default state for the customer. The codes are defined in the Inventory Descriptions file, under major type ST.

**Territory**

This is the default territory for the customer (Customer Maintenance, Sales Details). The codes are defined in the Inventory Descriptions file, under major type TR.

Select **Update (F8)** to save any changes.

## Order Close Window

To display this window, select **Close Order (F22)** on the Enter Order Item Details window.

Use this window to view details of the order lines, highlight stock shortages and provide sourcing facilities. You can also add items and charges.

The upper part of the window confirms the customer and contact details. This is followed by the list of order lines that have been recorded, including the [buying list](#) description, quantity, line value and line discounts. The window displays a warning message if the account is currently over the credit limit.

**Fields****Select (Untitled)**

This is linked to the Quantity field.

Enter one of the following:

1 - To source stock if there is problem sourcing stock from customer's default stockroom

This displays the Order Close Source an Item pop-up.

2 - To display the Pricing Detail Enquiry for your selected item

For more information, see the Whole Order Enquiry Summary Pricing Details window in Sales Order Processing.

**Functions****Pricing (F9)**

Use this to display the pricing details if you are using Advanced Pricing.

**Add an Item (F10)**

Use this to display the Add an Item pop-up to add an item to the [call list](#).

**Actions (F13)**

Use this to display the Order Close Actions pop-up.

Select **Update (F8)** to save any changes and display the Order Close Acceptance window.

## Order Close Source an Item Pop-up

To display this pop-up, enter 1 against an item and then press Enter on the Order Close window.

Use this pop-up to view the current stock position over all stockrooms for your selected item. If an alternative has been identified this is also listed. You can then make a sourcing decision.

There are three ways to source stock:

- 1 Ship the same item from a different stockroom.
- 2 Ship a replacement item from the normal stockroom.
- 3 Ship a replacement item from a different stockroom.

**Caution:** Items cannot be sourced from bonded warehouses.

### Fields

#### **Select (Untitled)**

Enter one of the following:

- 1 - To select the sourcing stockroom for this item
- 2 - To display the stock position in more detail for your item and selected stockroom
- 3 - Invoke the Transaction Control Effectivity Enquiry for the selected item.

**Note:** This option is not allowed when no transaction control code is shown for an item.

- 4 - Invoke the Item Supersession Enquiry for the selected item.

**Note:** This option is not allowed when no supersession code is shown for an item.

This displays the Stock Figures pop-up.

Enter an option and then press Enter to continue. The window that is displayed depends on the option selected.

## Stock Figures Pop-up

To display this pop-up, enter 2 against a stockroom and then press Enter on the Order Close Source An Item pop-up.

Use this pop-up to view the current stock position in more detail for your selected item and stockroom combination.

Select **Previous (F12)** to re-display the Order Close Source an Item pop-up.

---

## Order Close Actions Pop-up

To display this pop-up, select **Actions (F13)** on the Order Close window.

Use this pop-up to select the order close actions.

### Select (Untitled)

Enter **1** against an action:

Display Whole Order Details

This displays the Actions - Display Whole Order Details pop-up.

Display Customer [Promotions](#)

This displays the Actions - Display Customer [Promotions](#) pop-up.

Display [Sales Prompts](#)

This displays the Actions - Display [Sales Prompts](#) pop-up.

Maintain Order Text

This displays the Text Entry pop-up for the order.

Maintain Payment Details

This displays the Order Close Maintain Payment Details pop-up.

Maintain Contact Text

This displays the Text Entry pop-up for the contact.

Additional Overrides

This displays the Actions - Additional Overrides pop-up.

Enter 1 to select the option you want to use and then press Enter to continue.

## Order Close Maintain Payment Details Pop-up

To display this pop-up, enter 1 against the Maintain Payment Details action and then press Enter on the Order Close Actions pop-up.

Use this pop-up to maintain payment details for this customer and order combination. Payment terms are usually defined in Accounts Receivable. An order can be paid on a daily, monthly, or periodic basis in the form of cash, cheque, bankers draft, etc. These must be defined in Cash Management.

### **Fields**

#### **Payment Terms**

This consists of three fields that are used to define the default payment terms when you set up customers for this company. The terms defined here are the standard terms for this company. You can change them for individual customers.

The first field is a single character code that defines the type of terms:

D - Number of days from invoice date

M - Net monthly account number of months and payment due date

P - Periodic range

If you use **P**, you must enter a four-digit data range. For example, you could enter 1211, in the second field, where 12 specifies the 12th of the current month and is the start of the range, and 11 specifies the 11th of the next month and is the end of the range.

For the **D** and **M** codes, leave the second field blank. For code **D**, you must enter the number of days in the third field in the format DDD. For example, for a payment of 30 days from the receipt of invoice, enter 030.

For codes **P** and **M**, the third field contains the month and the day within that month (MDD). For example:

A code of M - \_\_\_ 210 generates a payment date of the 10th of the 2nd month following the date of invoice. In this example, an invoice date of 22/4/00 generates a payment date of 10/6/00.

A code of P 2019 106 generates, for all invoices with a document date between the 20th of this month and the 19th of the next month, a payment date of the 6th of the first month after the invoice month.

### **Payment Method**

The payment method codes are defined within Cash Management. This field is optional.

Examples are: CHQ, STD.

### **Cash Discount Code**

Select a cash discount code from those defined in the Inventory Descriptions file. You would use this field when a discount is given to a customer for paying in cash for their goods.

### **Staged Discount Code**

Select a discount to give to a customer if they pay for their goods within a specific timescale.

**Note:** *The Cash Discount and Staged Discount fields are mutually exclusive.*

Select **Update (F8)** to save any changes.

## Maintain Payment Details Bank Details Override

To display this window, select **Bank Details Override (F13)** on the Order Close Maintain Payment Details pop-up.

Use this window to view any bank account details set up for this customer.

### **Functions**



**Add (F10)**

Use this to add bank details. The fields displayed depend on the country in which the bank operates.

Enter 1 to select the bank account that you want to display, select **Add (F10)** to add new bank details, or select **Previous (F12)** to re-display the Order Close Maintain Payment Details pop-up.

## Order Close Acceptance Window

To display this window, select **Update (F8)** on the Order Close window.

This window displays the sales order number, so that you can enter the customer's purchase order number and confirm the next call.

**Fields****Customer Order Reference**

Enter the customer's purchase order number. This is mandatory if it has been requested on the Customer Sales Information window in the Customers maintenance task.

**Customer Order Date**

This field defaults to the current date but you can change it.

**Date Despatch Required**

This field defaults to the current date but you can change it.

**Next Call Date**

This field defaults to the next call date calculated from the [call profile](#) but you can change it.

**Next Call Time**

This field displays the start time of the earliest call window from the [call profile](#) but you can change it.

**Suspension Reason Code**

If [Telesales](#) has generated a suspension reason during order processing, for example, credit limit or zero price, you cannot change it.

You can select a reason code from those defined in the Inventory Descriptions file to suspend an order manually.

**Functions****Actions (F13)**

Use this to display the action pop-up.

The actions displayed are:

Display Whole Order Details

This displays the Actions - Display Whole Order Details pop-up.

Display Customer [Promotions](#)

This displays the Actions - Display Customer [Promotions](#) pop-up.

Display [Sales Prompts](#)

This displays the Actions - Display [Sales Prompts](#) pop-up.

Maintain Order Text

This displays the Text Entry pop-up.

Additional Overrides

This displays the Actions - Additional Overrides pop-up.

Maintain Additional Charges

This displays the Order Close Maintain Additional Charges pop-up.

### **Continue (F22)**

Use this to add this order to the list of orders to be transferred to the standard Sales Order Processing order bank. The next window displayed is the [call list](#).

Press Enter to validate the data and highlight any error conditions and then select **Continue (F22)** to close the order.

## Order Close Maintain Additional Charges Pop-up

To display this pop-up, enter 1 against the Maintain Additional Charges action and then press Enter on the Order Close Actions pop-up.

Use this pop-up to add up to three additional charges to the order.

### **Fields**

#### **Charge Code**

Select a charge code from those defined against major type SUNC in the Inventory Descriptions file.

#### **Charge Amount**

You can enter an amount, or use that attached to the charge code you select.

#### **Tax Code**

If you have specified a tax code as standard for the charge code, these details are retrieved when you press **Enter**. You can also select a tax code if required.

Select **Update (F8)** to save these changes and re-display the Order Close Acceptance window.

---

## Incoming Calls [2/TSP]

Sales operators can access the [call list](#) by customer and take a [Telesales](#) order, regardless of whether or not it is planned.

New orders cannot be raised if the delivery address or account has a status of I (Inactive).

**Note:** *An inactive account in a customer hierarchy has no effect on its child accounts.*

**Note:** *Use Order Capture to place orders for bonded customers.*

**Caution:** Calls cannot be taken for bonded customers.

## Incoming Calls Customer Selection Window

To display this window select the Incoming Calls task.

Alternatively, select **Incoming Calls (F22)** on the Call Selection window.

Use this window to identify the customer's account.

### **Fields**

#### **Customer Account Code**

Select a customer account code.

**Note:** *Calls cannot be taken for bonded customers.*

#### **Delivery Address Seq**

Enter the customer delivery address code for this order.

### **Functions**

#### **Outgoing Calls (F22)**

Use this to display Call Selection window.

Press Enter to display the Incoming Calls Call Selection window.

## Incoming Calls Call Selection Window

To display this window, press Enter on the Incoming Calls Customer Selection window.

This displays the summary details for any existing [call profiles](#), if the call is already planned. You can use this window to access the [call profiles](#) and contact maintenance windows. You can select a planned call, a [call profile](#) without a planned call or an incoming call.

### Select (Untitled)

Enter one of the following:

1 - Take Call

This starts the order taking cycle based upon the [call profile](#) selected.

If the call is planned, full facilities are available during order taking, including order history review and [Planned Delivery](#) support. If the call is not planned, the order can still be recorded, but order history and re-calculation of [Planned Delivery](#) values will not be done.

2 - Maintain Profile

This selects the [call profile](#) for maintenance.

## Functions

### Add New Profile (F10)

Use this to create [call profiles](#) that you can use as the basis for the subsequent order.

**Note:** When you record an order using this option, the process is the same as making an outgoing call. However, if the call was not already in the [call list](#) you will not be able to view order history details during order entry. After completing an order, the Incoming Calls Call Select window is re-displayed.

Press Enter to display the Establish Contact window for your incoming call.

# Telesales Processing Introduction

[Telesales](#) is a support environment for the sales operator. You can use it for simple and rapid access to data, so that you can answer questions as they arise.

To achieve this you must:

- Anticipate the nature of the orders to be taken
- Anticipate areas of concern to the customer

[Telesales](#) uses [call lists](#) to:

- Extract order history data
- Identify the relevant prices and discount lists
- Calculate average order and recommended stocks

---

When a sales operator records an order the details are written to a [Telesales](#) database, and these detail the optimal response time. At the end of the order these details are automatically transferred to the sales order system for picking and despatch.

## Generate Call Lists [31/TSP]

Use this task to prepare the [call list](#) up to a nominated date and to generate all of the supporting information. You would normally generate [call lists](#) once a day, but they can be generated more or less often.

## Call List Generation Window

To display this window, select the Generate [Call Lists](#) task.

The window displays the data that was entered in the previous [Call List](#) Generation, together with the standard defaults from the company profile.

There are three columns of input fields, one each for [Telesales](#), [Planned Delivery](#) and [Telemarketing](#). Using the date and parameters available, you can generate the [call list](#) for any combination of order types. Any previously defined standard defaults are displayed in the Default column on the left.

### **Fields**

#### **Remove Calls Before**

You must enter the date before which previously generated calls are removed. All calls before this date are deleted irrespective of their status (unless the call is currently in progress).

#### **Add Calls To**

You must enter a date in this field to add calls with a next call date equal to or before that date to the [call list](#).

[Telesales](#) reviews all [call profiles](#) to make sure that they have a next call date. If a next call date is not found, it calculates one based on the [call profile](#).

[Telesales](#) performs a validation check to make sure the call is not already present on the [call list](#).

**Note:** You can specify different Before and To dates for each of the three order methods.

#### **Pricing Overnight**

You can extract the normal price list and discount list details to speed interactive processing.

However, you can gain the maximum advantage if you limit this processing to [Telesales](#) and [Planned Delivery](#), particularly if there is a high probability of the [buying list](#) changing for [Telemarketing](#).

Enter one of the following:

0 - To process pricing interactively

1 - To process pricing overnight

### **Default Buying List**

You must specify a default [buying list](#). This is used as a basis for the preparatory work. This list is used if you have not specified one for the [call profile](#).

### **No. of Previous Orders**

Enter a value between 0 and 13 to specify the number of previous orders per customer that [Telesales](#) analyses for order history and displays during order taking.

**Note:** *The greater the number of orders specified, the longer analysis will take.*

### **Orders by Date/Week**

Enter one of the following:

1 - To display the order history by date

2 - To display the order history by week

### **Order Date Format**

If you have specified that you want to display order history by date, enter one of the following to specify the date format:

1 - For a format of dd/mm/yyyy

2 - For a format of ddmm yyyy

3 - For a format of mm ddyyyy

### **Calc. Recommended Stocks**

If you use [Planned Delivery](#), enter one of the following:

0 - Not to calculate the recommended stock for a customer using the history data

1 - To calculate the recommended stock for a customer using the history data

Press Enter to validate entries. Any errors will be highlighted. Then select **Submit (F8)** to process the [call list](#) generation.

## Manage Call Lists [22/TSP]

Use this task to review work that needs to be done and distributed amongst your available operators.

---

## Call Management Pause Window

To display this window, select the Manage [Call Lists](#) task

This warns the operator that after the first load of the day of the procedure, a re-organise routine is run.

[Telesales](#) displays the following message during the re-organise routine: "Operator workload being calculated".

Press Enter to display the [Call Management](#) Graph window.

## Call Management Graph Window

To display this window, press Enter on the [Call Management](#) Pause window.

This window displays the work that needs to be done by each operator in the format of a horizontal bar chart.

The operator codes are displayed on the left of the window. If there are more than 68 calls to be made, the horizontal axis is scaled to the appropriate size.

The following characters are used to indicate to nature of the calls:

- - Overdue Calls

# - Today's Calls

+ - Future Calls

### **Fields**

#### **Select (Untitled)**

Enter **1** to display the [Call Management](#) Call Action window for your selected operator.

#### **Operator**

This field displays the operator code for the current line of calls.

### **Functions**

#### **Summary (F13)**

Use this to display the [Call Management](#) Summary window.

Select an operator and then press Enter, or select **Summary (F13)** to display the next window.

## Call Management Summary Window

To display this window, select **Summary (F13)** on the [Call Management](#) Graph window.

Use this window to view a summary of the calls that need to be made by each operator.

### **Fields**

#### **Select (Untitled)**

Enter **1** to display the [Call Management](#) Call Action window.

### **Functions**

#### **Graph (F13)**

Use this to display the [Call Management](#) Graph window.

Select an operator and then press Enter, or select **Graph (F13)** to display the next window.

## Call Management Call Action Window

To display this window, select an operator and then press Enter on the [Call Management](#) Graph window.

Alternatively, select an operator and then press Enter on the [Call Management](#) Summary window.

Use this window to view a list of the calls that need to be made by an operator, and to re-schedule and re-distribute the work.

The window displays the list of calls by time of call in date sequence. Untimed calls are displayed before timed calls.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 1 - To display the [Call Management](#) Spread pop-up.
- 2 - To display the [Call Management](#) Reschedule pop-up.
- 3 - To display the [Call Management](#) Change Operator pop-up.

When you select any of these options, [Telesales](#) checks the authority level of the operator. You can select as many actions as required and in any combination.

#### **Action**

If any action has been taken for any of the calls, mnemonic codes are displayed in this column as follows:

- \***SPRD** - Spread
- \***RSCHD** - Rescheduled
- \***OPCHG** - Operator changed

Press Enter to process the actions you have selected. When one selected action has been processed, the next selected action is presented.



---

## Call Management Spread Pop-up

To display this pop-up, enter 1 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to re-allocate a number of calls for one operator by spreading them over a number of other operators.

The pop-up displays a list of the number of calls that need to be spread, together with a list of operators.

You can then enter the number of calls to be spread to each operator. The totals of the calls you select must equal the number of calls to spread.

**Note:** *To spread calls amongst other operators, you must have an authority level of 3.*

### **Fields**

#### **Number of Calls**

Enter the number of calls that you want to allocate to each operator. The total number of calls you select must equal the total number of calls to spread.

#### **Operator Name**

This field displays the name of the operator to whom you can allocate calls.

Press Enter to save the details and re-display the [Call Management](#) Call Action window.

## Reschedule Call Pop-up

To display this pop-up, enter 2 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to re-schedule the selected calls to a later date. The pop-up displays the current target date and time and the call times that this contact prefers.

#### **Current Next Call Date**

This field displays the date of the next call for this customer.

#### **Current Next Call Time**

This field displays the time of the next call for this customer.

#### **Preferred Call Time**

This field displays the time window within which you should ideally process this call.

#### **New Date**

Enter the new call date.

**New Time**

Enter the new call time.

**Caution:** You cannot enter a new time and date that is in the past.

**Reason**

You must enter a reason code for the change. These are defined in the Inventory Descriptions file.

Press Enter to update both the time and date details for the call and re-display the [Call Management](#) Call Action window.

## Change Operator Pop-up

To display this pop-up, enter 3 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to change the operator who is responsible for making a selected call.

**Fields****Select (Untitled)**

Enter **1** to re-allocate the call to the selected operator.

Press Enter to re-allocate the call and re-display the [Call Management](#) Call Action window.

## Outgoing Calls [1/TSP]

This task provides, in a single procedure, all of the information and support required by sales operators when they make calls.

You can:

- Select a call
- Establish contact
- Enter order item detail
- Add additional items and charges
- Close the order

New orders cannot be raised if the delivery address or account has a status of I (Inactive).

**Note:** *An inactive account in a customer hierarchy has no effect on its child accounts.*

**Note:** *Use Order Capture to place orders for bonded customers.*

---

**Note:** Calls cannot be taken for bonded customers.

This task has been designed to provide the best response time while your operator is recording the order line details, so that it minimises any inconvenience to the customer.

If you need a group of operators to work as a team, then you should do the following to achieve this:

- Set up each of the operators in their own right.
- Set up each call group as an operator.
- When you generate a [call list](#), [Telesales](#) selects one of the call groups as the preferred operator.
- When a call group operator signs on they will have no calls displayed. Select **Select List (F19)** to select their assigned call group.
- You can have more than one operator active on a list at one time.
- [Telesales](#) records the target operator, call group and the actual operator (the person who made the call) for historical purposes.

## Call Selection Window

To display this window select the Outgoing Calls task.

Call Selection allocates calls to the operator. You can make calls on a specific day and at a nominated time.

The upper half of the window displays timed calls and the lower half displays untimed calls.

The timed calls are sequenced by date and time and the untimed calls are sequenced by date.

Once you have selected a call, the scheduling program promotes the next call to the top of the window.

The top of the window also displays a sales prompt; this changes each time the window is changed.

**Caution:** Calls cannot be taken for bonded customers.

### Call Selection Operator

This field displays the name of the operator whose list is being displayed. This is normally the operator who has selected this option.

**Note:** If you have the correct authority, you can display the [call list](#) of any other operator. In this case, the name displayed is the name of operator whose [call list](#) is being displayed.

### Next Call

This is the next call that [Telesales](#) has determined should be made. This is reconsidered every five minutes, or when a call is scheduled or a change is made to the list of calls to be made.

**Note:** *An asterisk is displayed alongside the next call to be taken.*

### **Select 1 (Untitled)**

Enter one of the following:

- 1 - To select the call and display the Establish Contact window showing the data from the selected [call profile](#)
- 2 - The operator's authority is checked and then the Reschedule Call pop-up is displayed, allowing new times or dates to be entered.
- 3 - The operator's authority is checked and then the Change Operator pop-up is displayed, allowing a new operator to be selected.
- 4 - The operator's authority is checked and then the Abort Call pop-up is displayed. To abort a call you must enter a reason code.

**Note:** *Calls cannot be processed for bonded customers.*

### **Call Status Code (Untitled)**

This field displays a call status code as follows:

Blank - The call is due to be made today.

> - The call is planned in the future.

R - The call has been rescheduled from the original call date or time.

C - The call has been changed from one operator to another.

## **Functions**

### **Prompt (F4)**

Position the cursor on a [call list](#) entry and use this to display the Call Action pop-up. This pop-up contains a list of the actions taken for that call.

This is particularly useful if you can see that the call has been re-scheduled (R is displayed next to the call date), or changed from one operator to another (C is displayed next to the call date). You can select an action to view more information; this provides details of the change.

### **Sales Prompts (F13)**

Use this to display a list of the current [sales prompts](#) in a pop-up.

### **Select List (F19)**

Use this to display a list of current operators; you can work on a copy of their list.

### **Incoming Call (F22)**

This provides direct access to accept incoming calls. Exiting from incoming calls after completion will return you to the Call Selection window.

Select an option and then press Enter to display the next window.

---

## Establish Contact Window

To display this window, enter 1 against a customer and then press Enter on the Call Selection window.

To make the best use of the operator's time you must minimise the time taken to get to the right contact within your customer's organisation.

The type of call being made is displayed in the top right of the window as follows:

- [Telesales](#)
- [Planned Delivery](#)
- [Telemarketing](#)

The window is split into three areas. The first displays the customer details, including the [customer contact](#) and extension. The second displays the [buying list](#) for this customer. The third displays the Call Action field.

**Caution:** Calls cannot be sourced from a bonded warehouse.

### Fields

#### **Buying List**

This field displays the name of the [buying list](#) that was used to form the basis of the preparation for the call.

#### **Call List**

If you are processing a [Telemarketing](#) call, you can change this.

**Note:** *The next two fields are displayed below the [Buying List](#) field.*

#### **Maintain Text**

The most recent additional text for the contact is displayed. You can add to this, or amend this before you continue with the order.

#### **\*\* Warning**

If the customer has exceeded the credit limit or is on credit stop, [Telesales](#) displays a warning message. You can still take the order but [Telesales](#) suspends it until further action is taken.

#### **Call Action**

Enter one of the following:

- 2 - To display the Reschedule Call pop-up so that you can enter new times or dates
- 4 - To display the Abort Call pop-up with reason codes

Select a reason code to abort the call.

### Functions

**Previous (F12)**

If you select this to return to the Call Selection window, the Reason Code pop-up is displayed. You must select a reason before you can return to the Call Selection window.

**Select Contact (F19)**

Use this to display the Select Contact pop-up, so that you can ask for other known employees of the customer if your normal contact is not available.

If you select a different contact, that contact is automatically associated with this order.

**Text (F21)**

Use this to maintain contact text.

**Change List (F22)**

If you are processing a [Telemarketing](#) call, use this to display the Select [Buying List](#) pop-up so that you can change the list.

Press Enter to display the Enter Order Item Details window.

[Telesales](#) records the details of the order taking cycle agreed at this point, for example, the name of the actual contact and the actual [buying list](#) that you are using.

## Enter Order Item Details Window

To display this window, press Enter on the Establish Contact window.

Use this window to review an agreed [buying list](#) of items with a customer, and record the customer's requirements. There are two ways of doing this:

- In [Telesales](#) and [Telemarketing](#), enter the order quantity.
- In [Planned Delivery](#), enter the customer's current stock level.

**Note:** *If you use Catchweight, this window will calculate secondary values and UoMs.*

The type of call being made is displayed in the top right-hand corner of the window.

You can control the format of the centre area of the window using Presentation Design within Company Profile Maintenance.

Instances may arise where an item cannot be ordered. This is likely to be due to Customer Restrictions, Transaction Control or Supersession coming into effect.

**Fields****Customer and Contact**

These fields display the customer, and the contact at that customer, who is responsible for this order.

**Go To Panel Number**

Enter the window number of the [buying list](#) you want to view.

**Promotion (P)**

If the item is being promoted, an asterisk (\*) is displayed on this line. Position the cursor on the line and then select **Prompt (F4)** to display the details of the [promotion](#); you can then enter a quantity against these details to add them to the order, if required.

**Qty**

The information you need to enter here depends on the type of call in progress.

Enter one of the following:

- The order quantity ([Telesales](#) and [Telemarketing](#))
- The customer's current stock ([Planned Delivery](#))

Currency code and currency conversion details are also displayed if the customer is a currency customer.

**Functions****Prompt (F4)**

Use this to display details of current [promotions](#) for items marked with an asterisk (\*) in the **P** field. There are four kinds of information in this pop-up:

- 1 A summary of the type and details of the promotion is displayed.
- 2 If you have specified that a promotion item is sold in place of the standard item, for example, promotion packs, the item number is displayed together with the per factor.
- 3 The promotion text is displayed in this area.
- 4 You can enter the quantity to be ordered.

**Refresh (F5)**

Use this to re-display the original window with no changes.

**Add Item (F10)**

Use this to add an item to an order at any time during the order taking cycle. The Add an Item pop-up is displayed so that you can enter an item number and quantity. The required stock checking and pricing is performed during the order taking cycle.

**Actions (F13)**

Use this to display the Enter Order Item Details Actions pop-up, which displays the available actions for the information area.

**Customer's Stock (F18)**

This function is only available for [Planned Delivery](#). The quantity entered represents the customer's quoted stock position or the order quantity.

**Scroll Left (F19)/Scroll Right (F20)**

These are only displayed when the Previous Order Detail Information window is displayed. Use these to view information that is not displayed on the main area of the window.

**Close Order (F22)**

Use this to start the first phase of order close. You can use this to add and source non-standard items for this order.

Select a function to display the next window.

Alternatively, press Enter to select another item to include in the order.

## Add an Item Pop-up

To display this pop-up, select **Add (F10)** Item on the Enter Order Item Details window.

Use this pop-up to add a new item to the regular [call list](#) for your selected call.

**Fields****Item Code**

Select the item that you want to add to your [call list](#) for this order. Instances may arise where an item cannot be added. This is likely to be due to Customer Restrictions, Transaction Control or Supersession coming into effect.

**Qty Reqd**

Enter the quantity that your customer requires.

Press Enter to validate the details you have entered.

Select **Update (F8)** to save the details and re-display the Enter Order Item Details window.

## Enter Order Item Details Actions Pop-up

To display this pop-up, select **Actions (F13)** on the Enter Order Item Details window.

Use this pop-up to view a list of available information areas on which to base your selection. These are either variants on the basic Enter Order Item Details window, or pop-up displayed on it.

**Fields****Select (Untitled)**

Enter **1** to select an action.

Enter 1 to select an action and then press Enter to continue. The window that is displayed depends on the action that you select.



---

## Actions - Display Pricing Detail Window

To display this window, enter 1 against the Display Pricing Detail action and then press Enter on the Enter Order Item Details Actions pop-up.

You can display the price and discount information for the customer and [buying list](#), if pricing has been requested either at generation of [call lists](#) or interactively. You can decide this when you create the Company Control record.

The price is retrieved from the price list defined on the customer's additional details. The discount earned is interactively calculated and is displayed, as the window is re-displayed. The unit of measure for the item is also displayed.

For more information about this window see the Enter Order Item Details Window section.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Line Values Window

To display this window, enter 1 against the Display Line Values action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this window to view the line values for your selected call.

### **Fields**

The following fields are added to those already displayed on the Enter Order Item Details window.

#### **Extended Value**

The price list and discount lists are used to derive the current extended line value. The calculation is: Value - (Quantity x Price) - Discount.

#### **Prc.Lst**

This is the currency used by the price list.

#### **Dis.List**

This is the currency used by the discount list.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Whole Order Details Pop-up

To display this pop-up, enter 1 against the Display Whole Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This pop-up displays the value of the order taken by the operator so far. If the whole order discount is given, the percentage discount earned is also displayed. In certain situations you can use this to

raise the average value of orders taken, by informing the customer how much more needs to be spent to earn the next level of discount.

### **Fields**

#### **Order Value**

This field displays the value of the order to date, at item cost.

#### **Discount**

This field displays the discount given so far.

#### **Charges**

This field displays any additional charges that the order has accrued.

#### **Total Order**

This field displays the total value of the order so far, that is, the sum of the three fields above.

Two fields are displayed in the bottom half of the pop-up. These display the break points for achievable discounts.

#### **Order Value**

This field displays the value at which the discount shown in the Discount % field is applicable to the order.

#### **Discount %**

This field displays the percentage discount applicable at the order value shown in the associated Order Value field.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Previous Order Details Window

To display this window, enter 1 against the Display Previous Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This window displays the previous order details. You can tailor the display to the following information, using the company profile:

- You can display the orders by date, using a selected date format.
- You can control the number of orders you want to display, up to a maximum of 13.
- You can display the quantity ordered per week, rather than individual orders and dates if required.
- You can choose whether these quantities are the orders taken or the sales made.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

---

## Actions - Display Customer Promotions Pop-up

To display this pop-up, enter 1 against the Display Customer [Promotions](#) action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to display [promotions](#) for a specific customer or range of customers.

### **Fields**

#### **Promotion Number**

This field displays the unique code for the [promotion](#).

#### **Caption**

This field displays the title of the [promotion](#).

#### **Type**

This field displays the [promotion](#) type. These are defined in the Inventory Descriptions file and specified using [Promotions](#).

#### **Target**

This field displays the percentage increase in sales projected for this [promotion](#).

#### **Effectivity**

These fields display the dates between which this [promotion](#) is available.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Sales Prompts Pop-up

To display this pop-up, enter 1 against the Display [Sales Prompts](#) action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to view a list of current [sales prompts](#).

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Retrieve Previous Orders Window

To display this window, enter 1 against the Retrieve Previous Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This window displays previous orders for your selected customer and [call profile](#).

The order quantities for the previous order are retrieved and entered into the current order.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Planned Delivery Detail Window

To display this window, enter 1 against the Display [Planned Delivery](#) Detail action and then press Enter on the Enter Order Item Details Actions pop-up.

This option is only available if the order is a [Planned Delivery](#) order. You can use these fields to assist in taking orders for the [Planned Delivery](#) system.

If you use [Planned Delivery](#), the customer quotes their existing stock level and this is used, in conjunction with the other information displayed on this window, to calculate the required quantity. During the generation of [call lists Telesales](#) calculates the average order quantity per week. This is multiplied by the number of weeks cover required to give the recommended stock. When you enter the customer's stock figure, the difference between the recommended stock and the customer's stock figure results in the quantity to be ordered.

**Note:** The [Planned Delivery](#) Detail action displays the following fields on the Enter Order Item Details window:

### **No. Weeks Cover**

This field displays the number of weeks' trading for which the customer wants to hold stock.

### **Call Freq**

This field displays the frequency with which the customer is called.

### **Rec. Stock**

This field displays the recommended stock quantity.

### **Qty**

This field displays the quantity that needs to be ordered.

### **Avg Ord Qty**

This field displays the average order quantity.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Additional Overrides Pop-up

To display this pop-up, enter 1 against the Additional Overrides action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to enter order overrides.

### **Fields**

#### **Priced Despatch Notes**

Enter one of the following:

0 - Not to print prices on despatch notes

1 - To print prices on despatch notes

### **Type of Despatch Note**

Enter one of the following to determine whether to generate despatch notes and invoices separately, or produce a single combined document.

1 - For a separate despatch note and invoice

2 - For a combined document

### **Invoice Consolidation**

Enter one of the following to determine how you want to consolidate invoices:

0 - By despatch note

1 - Daily

2 - Weekly

***Note:** You can use this field if you have set the Type of Despatch Notes field to 1 to generate separate despatch notes and invoices.*

### **Despatch Note Language**

Select the language in which you want to print despatch notes. This is validated against those defined to the Application Manager.

### **Invoice Language**

Select the language in which you want to print invoices. This is validated against those defined to the Application Manager.

### **Despatch Method**

Select the default despatch method. These are defined in the Inventory Descriptions file, under major type MODE.

### **Transport Method**

Select the default transport method. These are defined in the Inventory Descriptions file, under major type TMTH.

### **Reason for Despatch**

By default this field is blank. Any entry made is validated against the Inventory Descriptions file, major type MOVR.

### **Terms of Delivery**

Select the default terms of delivery. These are defined in the Inventory Descriptions file, under major type TDEL.

**Note:** If you use World Trade, this field will default to the value held on the Sales Order Processing Customer Maintenance Trade Details window.

### **Carrier**

This field displays the default carrier. This field is validated depending on any interfaced applications. The following checks are carried out in the following order:

If you use Advanced Shipping, and the processing company is active with Sales Order Processing, the carrier will default to that defined via Shipping Customer Defaults.

If you enter a new code, it is validated against the Shipping Names and Addresses file in Shipping Customer Defaults Maintenance.

If you use Transport Planning, and the processing company is active within Sales Order Processing, the carrier will default to the carrier defined to the Transport Planning [Delivery Profile](#).

If you enter a new code, it is validated against the Transport Planning Carrier file.

A Sales Order Processing company is defined to a Transport Planning company via an SOP company/stockroom combination.

If you do not use Advanced Shipping or Transport Planning, then the default is blank. Any entry made must be defined in the Inventory Descriptions file file, under major type CARR.

### **Shipping Marks**

This is a free format field for shipping marks.

## **Functions**

### **Customer Attributes (F13)**

Use this to view the Additional Overrides Customer Attributes pop-up.

Select **Update (F8)** to save any changes.

## **Additional Overrides Customer Attributes Pop-up**

To display this pop-up, select **Customer Attributes (F13)** on the Actions - Additional Overrides pop-up.

**Note:** This is only available in Maintenance mode for authorised users.

Use this pop-up to override default customer details.

---

## **Fields**

### **Tax Calc Basis**

This field holds the customer's tax status for sales invoicing as follows:

- 1 - If the customer is tax exempt
- 2 - To use the tax code in the following field
- 3 - To use the tax code from the inventory item

**Note:** *If you use World Trade, you must set this to 3.*

### **Tax Code**

This field displays the tax code applicable. You must specify a code if you have set the Tax Calc. Basis field to 2 or 3.

### **Extra Rate Tax**

This field indicates whether an extra charge is applicable using the tax code defined.

### **Tax Country**

This field displays the country code for the country in which this customer is registered for tax. If this is a delivery address, and the same country applies to the statement address, you do not need to re-enter the information.

Validation and prompting on this field depends on interfacing applications.

**Note:** *If you use World Trade, the system will default to the Customer Trading Details setting. You must enter a country code that is valid to World Trade.*

**Note:** *If you do not use World Trade, the country code is validated against the General Ledger.*

### **Tax Registration**

This field displays the customer's tax registration number in the specified country.

**Note:** *If the General Ledger is live, tax registration will be validated according to a country-specific format based on the tax country code.*

### **Fiscal Code**

This field displays the classification code assigned by the government to this customer. This defaults to the value from the Customer Additional Details.

### **Salesman**

This field displays the default salesman for the customer. The codes are defined in the Inventory Descriptions file, under major type TN.

**Agent**

This field displays the default agent for the customer. The codes are defined in the Inventory Descriptions file, under major type AN.

**Sub Agent**

This field displays the default sub agent for the customer. The codes are defined in the Inventory Descriptions file, under major type AN.

**Region**

This field displays the default sales region for the customer. The codes are defined in the Inventory Descriptions file, under major type SN.

**State**

This field displays the default state for the customer. The codes are defined in the Inventory Descriptions file, under major type ST.

**Territory**

This is the default territory for the customer (Customer Maintenance, Sales Details). The codes are defined in the Inventory Descriptions file, under major type TR.

Select **Update (F8)** to save any changes.

## Order Close Window

To display this window, select **Close Order (F22)** on the Enter Order Item Details window.

Use this window to view details of the order lines, highlight stock shortages and provide sourcing facilities. You can also add items and charges.

The upper part of the window confirms the customer and contact details. This is followed by the list of order lines that have been recorded, including the [buying list](#) description, quantity, line value and line discounts. The window displays a warning message if the account is currently over the credit limit.

**Fields****Select (Untitled)**

This is linked to the Quantity field.

Enter one of the following:

1 - To source stock if there is problem sourcing stock from customer's default stockroom

This displays the Order Close Source an Item pop-up.

2 - To display the Pricing Detail Enquiry for your selected item



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For more information, see the Whole Order Enquiry Summary Pricing Details window in Sales Order Processing.

### **Functions**

#### **Pricing (F9)**

Use this to display the pricing details if you are using Advanced Pricing.

#### **Add an Item (F10)**

Use this to display the Add an Item pop-up to add an item to the [call list](#).

#### **Actions (F13)**

Use this to display the Order Close Actions pop-up.

Select **Update (F8)** to save any changes and display the Order Close Acceptance window.

## Order Close Source an Item Pop-up

To display this pop-up, enter 1 against an item and then press Enter on the Order Close window.

Use this pop-up to view the current stock position over all stockrooms for your selected item. If an alternative has been identified this is also listed. You can then make a sourcing decision.

There are three ways to source stock:

- 1 Ship the same item from a different stockroom.
- 2 Ship a replacement item from the normal stockroom.
- 3 Ship a replacement item from a different stockroom.

**Caution:** Items cannot be sourced from bonded warehouses.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

- 1 - To select the sourcing stockroom for this item
- 2 - To display the stock position in more detail for your item and selected stockroom

This displays the Stock Figures pop-up.

Enter an option and then press Enter to continue. The window that is displayed depends on the option selected.

## Stock Figures Pop-up

To display this pop-up, enter 2 against a stockroom and then press Enter on the Order Close Source An Item pop-up.

Use this pop-up to view the current stock position in more detail for your selected item and stockroom combination.

Select **Previous (F12)** to re-display the Order Close Source an Item pop-up.

## Order Close Actions Pop-up

To display this pop-up, select **Actions (F13)** on the Order Close window.

Use this pop-up to select the order close actions.

### Select (Untitled)

Enter **1** against an action:

Display Whole Order Details

This displays the Actions - Display Whole Order Details pop-up.

Display Customer [Promotions](#)

This displays the Actions - Display Customer [Promotions](#) pop-up.

Display [Sales Prompts](#)

This displays the Actions - Display [Sales Prompts](#) pop-up.

Maintain Order Text

This displays the Text Entry pop-up for the order.

Maintain Payment Details

This displays the Order Close Maintain Payment Details pop-up.

Maintain Contact Text

This displays the Text Entry pop-up for the contact.

Additional Overrides

This displays the Actions - Additional Overrides pop-up.

Enter 1 to select the option you want to use and then press Enter to continue.

## Order Close Maintain Payment Details Pop-up

To display this pop-up, enter 1 against the Maintain Payment Details action and then press Enter on the Order Close Actions pop-up.

Use this pop-up to maintain payment details for this customer and order combination. Payment terms are usually defined in Accounts Receivable. An order can be paid on a daily, monthly, or periodic basis in the form of cash, cheque, bankers draft, etc. These must be defined in Cash Management.

### **Fields**

#### **Payment Terms**

This consists of three fields that are used to define the default payment terms when you set up customers for this company. The terms defined here are the standard terms for this company. You can change them for individual customers.

The first field is a single character code that defines the type of terms:

D - Number of days from invoice date

M - Net monthly account number of months and payment due date

P - Periodic range

If you use **P**, you must enter a four-digit data range. For example, you could enter 1211, in the second field, where 12 specifies the 12th of the current month and is the start of the range, and 11 specifies the 11th of the next month and is the end of the range.

For the **D** and **M** codes, leave the second field blank. For code **D**, you must enter the number of days in the third field in the format DDD. For example, for a payment of 30 days from the receipt of invoice, enter 030.

For codes **P** and **M**, the third field contains the month and the day within that month (MDD). For example:

A code of M - \_\_\_ 210 generates a payment date of the 10th of the 2nd month following the date of invoice. In this example, an invoice date of 22/4/00 generates a payment date of 10/6/00.

A code of P 2019 106 generates, for all invoices with a document date between the 20th of this month and the 19th of the next month, a payment date of the 6th of the first month after the invoice month.

#### **Payment Method**

The payment method codes are defined within Cash Management. This field is optional.

Examples are: CHQ, STD.

#### **Cash Discount Code**

Select a cash discount code from those defined in the Inventory Descriptions file. You would use this field when a discount is given to a customer for paying in cash for their goods.

#### **Staged Discount Code**

Select a discount to give to a customer if they pay for their goods within a specific timescale.

**Note:** *The Cash Discount and Staged Discount fields are mutually exclusive.*

Select **Update (F8)** to save any changes.

## Maintain Payment Details Bank Details Override

To display this window, select **Bank Details Override (F13)** on the Order Close Maintain Payment Details pop-up.

Use this window to view any bank account details set up for this customer.

### **Functions**

#### **Add (F10)**

Use this to add bank details. The fields displayed depend on the country in which the bank operates.

Enter 1 to select the bank account that you want to display, select **Add (F10)** to add new bank details, or select **Previous (F12)** to re-display the Order Close Maintain Payment Details pop-up.

## Order Close Acceptance Window

To display this window, select **Update (F8)** on the Order Close window.

This window displays the sales order number, so that you can enter the customer's purchase order number and confirm the next call.

### **Fields**

#### **Customer Order Reference**

Enter the customer's purchase order number. This is mandatory if it has been requested on the Customer Sales Information window in the Customers maintenance task.

#### **Customer Order Date**

This field defaults to the current date but you can change it.

#### **Date Delivery Required**

This field defaults to the current date but you can change it.

#### **Next Call Date**

This field defaults to the next call date calculated from the [call profile](#) but you can change it.

#### **Next Call Time**

This field displays the start time of the earliest call window from the [call profile](#) but you can change it.

### **Suspension Reason Code**

If [Telesales](#) has generated a suspension reason during order processing, for example, credit limit or zero price, you cannot change it.

You can select a reason code from those defined in the Inventory Descriptions file to suspend an order manually.

### **Functions**

#### **Actions (F13)**

Use this to display the action pop-up.

The actions displayed are:

Display Whole Order Details

This displays the Actions - Display Whole Order Details pop-up.

Display Customer [Promotions](#)

This displays the Actions - Display Customer [Promotions](#) pop-up.

Display [Sales Prompts](#)

This displays the Actions - Display [Sales Prompts](#) pop-up.

Maintain Order Text

This displays the Text Entry pop-up.

Additional Overrides

This displays the Actions - Additional Overrides pop-up.

Maintain Additional Charges

This displays the Order Close Maintain Additional Charges pop-up.

#### **Continue (F22)**

Use this to add this order to the list of orders to be transferred to the standard Sales Order Processing order bank. The next window displayed is the [call list](#).

Press Enter to validate the data and highlight any error conditions and then select **Continue (F22)** to close the order.

## Order Close Maintain Additional Charges Pop-up

To display this pop-up, enter 1 against the Maintain Additional Charges action and then press Enter on the Order Close Actions pop-up.

Use this pop-up to add up to three additional charges to the order.

### **Fields**

**Charge Code**

Select a charge code from those defined against major type SUNC in the Inventory Descriptions file.

**Charge Amount**

You can enter an amount, or use that attached to the charge code you select.

**Tax Code**

If you have specified a tax code as standard for the charge code, these details are retrieved when you press **Enter**. You can also select a tax code if required.

Select **Update (F8)** to save these changes and re-display the Order Close Acceptance window.

## Incoming Calls [2/TSP]

Sales operators can access the [call list](#) by customer and take a [Telesales](#) order, regardless of whether or not it is planned.

New orders cannot be raised if the delivery address or account has a status of I (Inactive).

**Note:** *An inactive account in a customer hierarchy has no effect on its child accounts.*

**Note:** *Use Order Capture to place orders for bonded customers.*

**Caution:** Calls cannot be taken for bonded customers.

## Incoming Calls Customer Selection Window

To display this window select the Incoming Calls task.

Alternatively, select **Incoming Calls (F22)** on the Call Selection window.

Use this window to identify the customer's account.

**Fields****Customer Account Code**

Select a customer account code.

**Note:** *Calls cannot be taken for bonded customers.*

**Delivery Address Seq**

Enter the customer delivery address code for this order.

**Functions****Outgoing Calls (F22)**

Use this to display Call Selection window.

Press Enter to display the Incoming Calls Call Selection window.

## Incoming Calls Call Selection Window

To display this window, press Enter on the Incoming Calls Customer Selection window.

This displays the summary details for any existing [call profiles](#), if the call is already planned. You can use this window to access the [call profiles](#) and contact maintenance windows. You can select a planned call, a [call profile](#) without a planned call or an incoming call.

**Fields****Select (Untitled)**

Enter one of the following:

1 - Take Call

This starts the order taking cycle based upon the [call profile](#) selected.

If the call is planned, full facilities are available during order taking, including order history review and [Planned Delivery](#) support. If the call is not planned, the order can still be recorded, but order history and re-calculation of [Planned Delivery](#) values will not be done.

2 - Maintain Profile

This selects the [call profile](#) for maintenance.

**Functions****Add New Profile (F10)**

Use this to create [call profiles](#) that you can use as the basis for the subsequent order.

**Note:** *When you record an order using this option, the process is the same as making an outgoing call. However, if the call was not already in the [call list](#) you will not be able to view order history details during order entry. After completing an order, the Incoming Calls Call Select window is re-displayed.*

Press Enter to display the Establish Contact window for your incoming call.

## Telesales Processing Introduction

[Telesales](#) is a support environment for the sales operator. You can use it for simple and rapid access to data, so that you can answer questions as they arise.

To achieve this you must:

- Anticipate the nature of the orders to be taken
- Anticipate areas of concern to the customer

[Telesales](#) uses [call lists](#) to:

- Extract order history data
- Identify the relevant prices and discount lists
- Calculate average order and recommended stocks

When a sales operator records an order the details are written to a [Telesales](#) database, and these detail the optimal response time. At the end of the order these details are automatically transferred to the sales order system for picking and despatch.

## Generate Call Lists [31/TSP]

Use this task to prepare the [call list](#) up to a nominated date and to generate all of the supporting information. You would normally generate [call lists](#) once a day, but they can be generated more or less often.

## Call List Generation Window

To display this window, select the Generate [Call Lists](#) task.

The window displays the data that was entered in the previous [Call List](#) Generation, together with the standard defaults from the company profile.

There are three columns of input fields, one each for [Telesales](#), [Planned Delivery](#) and [Telemarketing](#). Using the date and parameters available, you can generate the [call list](#) for any combination of order types. Any previously defined standard defaults are displayed in the Default column on the left.

### **Fields**

#### **Remove Calls Before**

You must enter the date before which previously generated calls are removed. All calls before this date are deleted irrespective of their status (unless the call is currently in progress).



**Add Calls To**

You must enter a date in this field to add calls with a next call date equal to or before that date to the [call list](#).

[Telesales](#) reviews all [call profiles](#) to make sure that they have a next call date. If a next call date is not found, it calculates one based on the [call profile](#).

[Telesales](#) performs a validation check to make sure the call is not already present on the [call list](#).

**Note:** *You can specify different Before and To dates for each of the three order methods.*

**Pricing Overnight**

You can extract the normal price list and discount list details to speed interactive processing.

However, you can gain the maximum advantage if you limit this processing to [Telesales](#) and [Planned Delivery](#), particularly if there is a high probability of the [buying list](#) changing for [Telemarketing](#).

Enter one of the following:

- 0 - To process pricing interactively
- 1 - To process pricing overnight

**Default Buying List**

You must specify a default [buying list](#). This is used as a basis for the preparatory work. This list is used if you have not specified one for the [call profile](#).

**No. of Previous Orders**

Enter a value between 0 and 13 to specify the number of previous orders per customer that [Telesales](#) analyses for order history and displays during order taking.

**Note:** *The greater the number of orders specified, the longer analysis will take.*

**Orders by Date/Week**

Enter one of the following:

- 1 - To display the order history by date
- 2 - To display the order history by week

**Order Date Format**

If you have specified that you want to display order history by date, enter one of the following to specify the date format:

- 1 - For a format of dd/mm/yyyy
- 2 - For a format of ddmm yyyy
- 3 - For a format of mm ddyyyy

### **Calc. Recommended Stocks**

If you use [Planned Delivery](#), enter one of the following:

0 - Not to calculate the recommended stock for a customer using the history data

1 - To calculate the recommended stock for a customer using the history data

Press Enter to validate entries. Any errors will be highlighted. Then select **Submit (F8)** to process the [call list](#) generation.

## Manage Call Lists [22/TSP]

Use this task to review work that needs to be done and distributed amongst your available operators.

## Call Management Pause Window

To display this window, select the Manage [Call Lists](#) task

This warns the operator that after the first load of the day of the procedure, a re-organise routine is run.

[Telesales](#) displays the following message during the re-organise routine: "Operator workload being calculated".

Press Enter to display the [Call Management](#) Graph window.

## Call Management Graph Window

To display this window, press Enter on the [Call Management](#) Pause window.

This window displays the work that needs to be done by each operator in the format of a horizontal bar chart.

The operator codes are displayed on the left of the window. If there are more than 68 calls to be made, the horizontal axis is scaled to the appropriate size.

The following characters are used to indicate to nature of the calls:

-- Overdue Calls

# - Today's Calls

+ - Future Calls

### **Fields**

**Select (Untitled)**

Enter **1** to display the [Call Management](#) Call Action window for your selected operator.

**Operator**

This field displays the operator code for the current line of calls.

**Functions****Summary (F13)**

Use this to display the [Call Management](#) Summary window.

Select an operator and then press Enter, or select **Summary (F13)** to display the next window.

## Call Management Summary Window

To display this window, select **Summary (F13)** on the [Call Management](#) Graph window.

Use this window to view a summary of the calls that need to be made by each operator.

**Fields****Select (Untitled)**

Enter **1** to display the [Call Management](#) Call Action window.

**Functions****Graph (F13)**

Use this to display the [Call Management](#) Graph window.

Select an operator and then press Enter, or select **Graph (F13)** to display the next window.

## Call Management Call Action Window

To display this window, select an operator and then press Enter on the [Call Management](#) Graph window.

Alternatively, select an operator and then press Enter on the [Call Management](#) Summary window.

Use this window to view a list of the calls that need to be made by an operator, and to re-schedule and re-distribute the work.

The window displays the list of calls by time of call in date sequence. Untimed calls are displayed before timed calls.

**Fields****Select (Untitled)**

Enter one of the following:

- 1 - To display the [Call Management](#) Spread pop-up.
- 2 - To display the [Call Management](#) Reschedule pop-up.
- 3 - To display the [Call Management](#) Change Operator pop-up.

When you select any of these options, [Telesales](#) checks the authority level of the operator. You can select as many actions as required and in any combination.

### **Action**

If any action has been taken for any of the calls, mnemonic codes are displayed in this column as follows:

\***SPRD** - Spread

\***RSCHD** - Rescheduled

\***OPCHG** - Operator changed

Press Enter to process the actions you have selected. When one selected action has been processed, the next selected action is presented.

## Call Management Spread Pop-up

To display this pop-up, enter 1 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to re-allocate a number of calls for one operator by spreading them over a number of other operators.

The pop-up displays a list of the number of calls that need to be spread, together with a list of operators.

You can then enter the number of calls to be spread to each operator. The totals of the calls you select must equal the number of calls to spread.

**Note:** *To spread calls amongst other operators, you must have an authority level of 3.*

### **Fields**

#### **Number of Calls**

Enter the number of calls that you want to allocate to each operator. The total number of calls you select must equal the total number of calls to spread.

#### **Operator Name**

This field displays the name of the operator to whom you can allocate calls.

Press Enter to save the details and re-display the [Call Management](#) Call Action window.

---

## Reschedule Call Pop-up

To display this pop-up, enter 2 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to re-schedule the selected calls to a later date. The pop-up displays the current target date and time and the call times that this contact prefers.

### **Fields**

#### **Current Next Call Date**

This field displays the date of the next call for this customer.

#### **Current Next Call Time**

This field displays the time of the next call for this customer.

#### **Preferred Call Time**

This field displays the time window within which you should ideally process this call.

#### **New Date**

Enter the new call date.

#### **New Time**

Enter the new call time.

**Caution:** You cannot enter a new time and date that is in the past.

#### **Reason**

You must enter a reason code for the change. These are defined in the Inventory Descriptions file.

Press Enter to update both the time and date details for the call and re-display the [Call Management](#) Call Action window.

## Change Operator Pop-up

To display this pop-up, enter 3 against a call and then press Enter on the [Call Management](#) Call Action window.

Use this pop-up to change the operator who is responsible for making a selected call.

### **Fields**

#### **Select (Untitled)**

Enter 1 to re-allocate the call to the selected operator.

Press Enter to re-allocate the call and re-display the [Call Management](#) Call Action window.

## Outgoing Calls [1/TSP]

This task provides, in a single procedure, all of the information and support required by sales operators when they make calls.

You can:

- Select a call
- Establish contact
- Enter order item detail
- Add additional items and charges
- Close the order

New orders cannot be raised if the delivery address or account has a status of I (Inactive).

**Note:** *An inactive account in a customer hierarchy has no effect on its child accounts.*

**Note:** *Use Order Capture to place orders for bonded customers.*

**Note:** *Calls cannot be taken for bonded customers.*

This task has been designed to provide the best response time while your operator is recording the order line details, so that it minimises any inconvenience to the customer.

If you need a group of operators to work as a team, then you should do the following to achieve this:

- Set up each of the operators in their own right.
- Set up each call group as an operator.
- When you generate a [call list](#), [Telesales](#) selects one of the call groups as the preferred operator.
- When a call group operator signs on they will have no calls displayed. Select **Select List (F19)** to select their assigned call group.
- You can have more than one operator active on a list at one time.
- [Telesales](#) records the target operator, call group and the actual operator (the person who made the call) for historical purposes.

---

## Call Selection Window

To display this window select the Outgoing Calls task.

Call Selection allocates calls to the operator. You can make calls on a specific day and at a nominated time.

The upper half of the window displays timed calls and the lower half displays untimed calls.

The timed calls are sequenced by date and time and the untimed calls are sequenced by date.

Once you have selected a call, the scheduling program promotes the next call to the top of the window.

The top of the window also displays a sales prompt; this changes each time the window is changed.

**Caution:** Calls cannot be taken for bonded customers.

### Fields

#### **Call Selection Operator**

This field displays the name of the operator whose list is being displayed. This is normally the operator who has selected this option.

**Note:** If you have the correct authority, you can display the [call list](#) of any other operator. In this case, the name displayed is the name of operator whose [call list](#) is being displayed.

#### **Next Call**

This is the next call that [Telesales](#) has determined should be made. This is reconsidered every five minutes, or when a call is scheduled or a change is made to the list of calls to be made.

**Note:** An asterisk is displayed alongside the next call to be taken.

#### **Select 1 (Untitled)**

Enter one of the following:

- 1 - To select the call and display the Establish Contact window showing the data from the selected [call profile](#)
- 2 - The operator's authority is checked and then the Reschedule Call pop-up is displayed, allowing new times or dates to be entered.
- 3 - The operator's authority is checked and then the Change Operator pop-up is displayed, allowing a new operator to be selected.
- 4 - The operator's authority is checked and then the Abort Call pop-up is displayed. To abort a call you must enter a reason code.

**Note:** Calls cannot be processed for bonded customers.

**Call Status Code (Untitled)**

This field displays a call status code as follows:

Blank - The call is due to be made today.

> - The call is planned in the future.

R - The call has been rescheduled from the original call date or time.

C - The call has been changed from one operator to another.

**Functions****Prompt (F4)**

Position the cursor on a [call list](#) entry and use this to display the Call Action pop-up. This pop-up contains a list of the actions taken for that call.

This is particularly useful if you can see that the call has been re-scheduled (R is displayed next to the call date), or changed from one operator to another (C is displayed next to the call date). You can select an action to view more information; this provides details of the change.

**Sales Prompts (F13)**

Use this to display a list of the current [sales prompts](#) in a pop-up.

**Select List (F19)**

Use this to display a list of current operators; you can work on a copy of their list.

**Incoming Call (F22)**

This provides direct access to accept incoming calls. Exiting from incoming calls after completion will return you to the Call Selection window.

Select an option and then press Enter to display the next window.

## Establish Contact Window

To display this window, enter 1 against a customer and then press Enter on the Call Selection window.

To make the best use of the operator's time you must minimise the time taken to get to the right contact within your customer's organisation.

The type of call being made is displayed in the top right of the window as follows:

- [Telesales](#)
- [Planned Delivery](#)
- [Telemarketing](#)

The window is split into three areas. The first displays the customer details, including the [customer contact](#) and extension. The second displays the [buying list](#) for this customer. The third displays the Call Action field.



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**Caution:** Calls cannot be sourced from a bonded warehouse.

## **Fields**

### **Buying List**

This field displays the name of the [buying list](#) that was used to form the basis of the preparation for the call.

### **Call List**

If you are processing a [Telemarketing](#) call, you can change this.

**Note:** *The next two fields are displayed below the [Buying List](#) field.*

### **Maintain Text**

The most recent additional text for the contact is displayed. You can add to this, or amend this before you continue with the order.

### **\*\* Warning**

If the customer has exceeded the credit limit or is on credit stop, [Telesales](#) displays a warning message. You can still take the order but [Telesales](#) suspends it until further action is taken.

### **Call Action**

Enter one of the following:

2 - To display the Reschedule Call pop-up so that you can enter new times or dates

4 - To display the Abort Call pop-up with reason codes

Select a reason code to abort the call.

## **Functions**

### **Previous (F12)**

If you select this to return to the Call Selection window, the Reason Code pop-up is displayed. You must select a reason before you can return to the Call Selection window.

### **Select Contact (F19)**

Use this to display the Select Contact pop-up, so that you can ask for other known employees of the customer if your normal contact is not available.

If you select a different contact, that contact is automatically associated with this order.

### **Text (F21)**

Use this to maintain contact text.

### **Change List (F22)**

If you are processing a [Telemarketing](#) call, use this to display the Select [Buying List](#) pop-up so that you can change the list.

Press Enter to display the Enter Order Item Details window.

[Telesales](#) records the details of the order taking cycle agreed at this point, for example, the name of the actual contact and the actual [buying list](#) that you are using.

## Enter Order Item Details Window

To display this window, press Enter on the Establish Contact window.

Use this window to review an agreed [buying list](#) of items with a customer, and record the customer's requirements. There are two ways of doing this:

- In [Telesales](#) and [Telemarketing](#), enter the order quantity.
- In [Planned Delivery](#), enter the customer's current stock level.

**Note:** *If you use Catchweight, this window will calculate secondary values and UoMs.*

The type of call being made is displayed in the top right-hand corner of the window.

You can control the format of the centre area of the window using Presentation Design within Company Profile Maintenance.

Instances may arise where an item cannot be ordered. This is likely to be due to Customer Restrictions, Transaction Control or Supersession coming into effect.

### **Fields**

#### **Customer and Contact**

These fields display the customer, and the contact at that customer, who is responsible for this order.

#### **Go To Panel Number**

Enter the window number of the [buying list](#) you want to view.

#### **Promotion (P)**

If the item is being promoted, an asterisk (\*) is displayed on this line. Position the cursor on the line and then select **Prompt (F4)** to display the details of the [promotion](#); you can then enter a quantity against these details to add them to the order, if required.

#### **Qty**

The information you need to enter here depends on the type of call in progress.

Enter one of the following:

- The order quantity ([Telesales](#) and [Telemarketing](#))
- The customer's current stock ([Planned Delivery](#))

Currency code and currency conversion details are also displayed if the customer is a currency customer.

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## **Functions**

### **Prompt (F4)**

Use this to display details of current [promotions](#) for items marked with an asterisk (\*) in the **P** field. There are four kinds of information in this pop-up:

- 1 A summary of the type and details of the promotion is displayed.
- 2 If you have specified that a promotion item is sold in place of the standard item, for example, promotion packs, the item number is displayed together with the per factor.
- 3 The promotion text is displayed in this area.
- 4 You can enter the quantity to be ordered.

### **Refresh (F5)**

Use this to re-display the original window with no changes.

### **Add Item (F10)**

Use this to add an item to an order at any time during the order taking cycle. The Add an Item pop-up is displayed so that you can enter an item number and quantity. The required stock checking and pricing is performed during the order taking cycle.

### **Actions (F13)**

Use this to display the Enter Order Item Details Actions pop-up, which displays the available actions for the information area.

### **Customer's Stock (F18)**

This function is only available for [Planned Delivery](#). The quantity entered represents the customer's quoted stock position or the order quantity.

### **Scroll Left (F19)/Scroll Right (F20)**

These are only displayed when the Previous Order Detail Information window is displayed. Use these to view information that is not displayed on the main area of the window.

### **Close Order (F22)**

Use this to start the first phase of order close. You can use this to add and source non-standard items for this order.

Select a function to display the next window.

Alternatively, press Enter to select another item to include in the order.

## **Add an Item Pop-up**

To display this pop-up, select **Add Item (F10)** on the Enter Order Item Details window.

Use this pop-up to add a new item to the regular [call list](#) for your selected call.

## **Fields**

**Item Code**

Select the item that you want to add to your [call list](#) for this order. Instances may arise where an item cannot be added. This is likely to be due to Customer Restrictions, Transaction Control or Supersession coming into effect.

**Qty Reqd**

Enter the quantity that your customer requires.

Press Enter to validate the details you have entered.

Select **Update (F8)** to save the details and re-display the Enter Order Item Details window.

## Enter Order Item Details Actions Pop-up

To display this pop-up, select **Actions (F13)** on the Enter Order Item Details window.

Use this pop-up to view a list of available information areas on which to base your selection. These are either variants on the basic Enter Order Item Details window, or pop-up displayed on it.

**Fields****Select (Untitled)**

Enter **1** to select an action.

Enter **1** to select an action and then press Enter to continue. The window that is displayed depends on the action that you select.

## Actions - Display Pricing Detail Window

To display this window, enter **1** against the Display Pricing Detail action and then press Enter on the Enter Order Item Details Actions pop-up.

You can display the price and discount information for the customer and [buying list](#), if pricing has been requested either at generation of [call lists](#) or interactively. You can decide this when you create the Company Control record.

The price is retrieved from the price list defined on the customer's additional details. The discount earned is interactively calculated and is displayed, as the window is re-displayed. The unit of measure for the item is also displayed.

For more information about this window see the Enter Order Item Details Window section.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Line Values Window

To display this window, enter 1 against the Display Line Values action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this window to view the line values for your selected call.

### **Fields**

The following fields are added to those already displayed on the Enter Order Item Details window.

#### **Extended Value**

The price list and discount lists are used to derive the current extended line value. The calculation is: Value - (Quantity x Price) - Discount.

#### **Prc.Lst**

This is the currency used by the price list.

#### **Dis.List**

This is the currency used by the discount list.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Whole Order Details Pop-up

To display this pop-up, enter 1 against the Display Whole Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This pop-up displays the value of the order taken by the operator so far. If the whole order discount is given, the percentage discount earned is also displayed. In certain situations you can use this to raise the average value of orders taken, by informing the customer how much more needs to be spent to earn the next level of discount.

### **Fields**

#### **Order Value**

This field displays the value of the order to date, at item cost.

#### **Discount**

This field displays the discount given so far.

#### **Charges**

This field displays any additional charges that the order has accrued.

#### **Total Order**

This field displays the total value of the order so far, that is, the sum of the three fields above.

Two fields are displayed in the bottom half of the pop-up. These display the break points for achievable discounts.

**Order Value**

This field displays the value at which the discount shown in the Discount % field is applicable to the order.

**Discount %**

This field displays the percentage discount applicable at the order value shown in the associated Order Value field.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Previous Order Details Window

To display this window, enter 1 against the Display Previous Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This window displays the previous order details. You can tailor the display to the following information, using the company profile:

- You can display the orders by date, using a selected date format.
- You can control the number of orders you want to display, up to a maximum of 13.
- You can display the quantity ordered per week, rather than individual orders and dates if required.
- You can choose whether these quantities are the orders taken or the sales made.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Customer Promotions Pop-up

To display this pop-up, enter 1 against the Display Customer [Promotions](#) action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to display [promotions](#) for a specific customer or range of customers.

**Fields****Promotion Number**

This field displays the unique code for the [promotion](#).

**Caption**

This field displays the title of the [promotion](#).

**Type**

This field displays the [promotion](#) type. These are defined in the Inventory Descriptions file and specified using [Promotions](#).

**Target**

This field displays the percentage increase in sales projected for this [promotion](#).

**Effectivity**

These fields display the dates between which this [promotion](#) is available.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Sales Prompts Pop-up

To display this pop-up, enter 1 against the Display [Sales Prompts](#) action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to view a list of current [sales prompts](#).

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Retrieve Previous Orders Window

To display this window, enter 1 against the Retrieve Previous Order Details action and then press Enter on the Enter Order Item Details Actions pop-up.

This window displays previous orders for your selected customer and [call profile](#).

The order quantities for the previous order are retrieved and entered into the current order.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Display Planned Delivery Detail Window

To display this window, enter 1 against the Display [Planned Delivery](#) Detail action and then press Enter on the Enter Order Item Details Actions pop-up.

This option is only available if the order is a [Planned Delivery](#) order. You can use these fields to assist in taking orders for the [Planned Delivery](#) system.

If you use [Planned Delivery](#), the customer quotes their existing stock level and this is used, in conjunction with the other information displayed on this window, to calculate the required quantity. During the generation of [call lists Telesales](#) calculates the average order quantity per week. This is multiplied by the number of weeks cover required to give the recommended stock. When you enter

the customer's stock figure, the difference between the recommended stock and the customer's stock figure results in the quantity to be ordered.

### **Fields**

**Note:** The [Planned Delivery](#) Detail action displays the following fields on the Enter Order Item Details window:

#### **No. Weeks Cover**

This field displays the number of weeks' trading for which the customer wants to hold stock.

#### **Call Freq**

This field displays the frequency with which the customer is called.

#### **Rec. Stock**

This field displays the recommended stock quantity.

#### **Qty**

This field displays the quantity that needs to be ordered.

#### **Avg Ord Qty**

This field displays the average order quantity.

Select **Previous (F12)** to re-display the Enter Order Item Details Actions pop-up.

## Actions - Additional Overrides Pop-up

To display this pop-up, enter 1 against the Additional Overrides action and then press Enter on the Enter Order Item Details Actions pop-up.

Use this pop-up to enter order overrides.

### **Fields**

#### **Priced Despatch Notes**

Enter one of the following:

0 - Not to print prices on despatch notes

1 - To print prices on despatch notes

#### **Type of Despatch Note**

Enter one of the following to determine whether to generate despatch notes and invoices separately, or produce a single combined document.

1 - For a separate despatch note and invoice

2 - For a combined document



**Invoice Consolidation**

Enter one of the following to determine how you want to consolidate invoices:

**Note:** You can use this field if you have set the *Type of Despatch Notes* field to 1 to generate separate despatch notes and invoices.

0 - By despatch note

1 - Daily

2 - Weekly

3 - Monthly

**Despatch Note Language**

Select the language in which you want to print despatch notes. This is validated against those defined to the Application Manager.

**Invoice Language**

Select the language in which you want to print invoices. This is validated against those defined to the Application Manager.

**Despatch Method**

Select the default despatch method. These are defined in the Inventory Descriptions file, under major type MODE.

**Transport Method**

Select the default transport method. These are defined in the Inventory Descriptions file, under major type TMTH.

**Reason for Despatch**

By default this field is blank. Any entry made is validated against the Inventory Descriptions file, major type MOVR.

**Terms of Delivery**

Select the default terms of delivery. These are defined in the Inventory Descriptions file, under major type TDEL.

**Note:** If you use World Trade, this field will default to the value held on the Sales Order Processing Customer Maintenance Trade Details window.

**Carrier**

This field displays the default carrier. This field is validated depending on any interfaced applications. The following checks are carried out in the following order:

If you use Advanced Shipping, and the processing company is active with Sales Order Processing, the carrier will default to that defined via Shipping Customer Defaults.

If you enter a new code, it is validated against the Shipping Names and Addresses file in Shipping Customer Defaults Maintenance.

If you use Transport Planning, and the processing company is active within Sales Order Processing, the carrier will default to the carrier defined to the Transport Planning [Delivery Profile](#).

If you enter a new code, it is validated against the Transport Planning Carrier file.

A Sales Order Processing company is defined to a Transport Planning company via an SOP company/stockroom combination.

If you do not use Advanced Shipping or Transport Planning, then the default is blank. Any entry made must be defined in the Inventory Descriptions file file, under major type CARR.

### **Shipping Marks**

This is a free format field for shipping marks.

### **Functions**

#### **Customer Attributes (F13)**

Use this to view the Additional Overrides Customer Attributes pop-up.

Select **Update (F8)** to save any changes.

## Additional Overrides Customer Attributes Pop-up

To display this pop-up, select Customer Attributes (F13) on the Actions - Additional Overrides pop-up.

**Note:** *This is only available in Maintenance mode for authorised users.*

Use this pop-up to override default customer details.

### **Fields**

#### **Tax Calc Basis**

This field holds the customer's tax status for sales invoicing as follows:

- 1 - If the customer is tax exempt
- 2 - To use the tax code in the following field
- 3 - To use the tax code from the inventory item

**Note:** *If you use World Trade, you must set this to 3.*

**Tax Code**

This field displays the tax code applicable. You must specify a code if you have set the Tax Calc. Basis field to 2 or 3.

**Extra Rate Tax**

This field indicates whether an extra charge is applicable using the tax code defined.

**Tax Country**

This field displays the country code for the country in which this customer is registered for tax. If this is a delivery address, and the same country applies to the statement address, you do not need to re-enter the information.

Validation and prompting on this field depends on interfacing applications.

**Note:** *If you use World Trade, the system will default to the Customer Trading Details setting. You must enter a country code that is valid to World Trade.*

**Note:** *If you do not use World Trade, the country code is validated against the General Ledger.*

**Tax Registration**

This field displays the customer's tax registration number in the specified country.

**Note:** *If the General Ledger is live, tax registration will be validated according to a country-specific format based on the tax country code.*

**Fiscal Code**

This field displays the classification code assigned by the government to this customer. This defaults to the value from the Customer Additional Details.

**Salesman**

This field displays the default salesman for the customer. The codes are defined in the Inventory Descriptions file, under major type TN.

**Agent**

This field displays the default agent for the customer. The codes are defined in the Inventory Descriptions file, under major type AN.

**Sub Agent**

This field displays the default sub agent for the customer. The codes are defined in the Inventory Descriptions file, under major type AN.

**Region**

This field displays the default sales region for the customer. The codes are defined in the Inventory Descriptions file, under major type SN.

**State**

This field displays the default state for the customer. The codes are defined in the Inventory Descriptions file, under major type ST.

**Territory**

This is the default territory for the customer (Customer Maintenance, Sales Details). The codes are defined in the Inventory Descriptions file, under major type TR.

Select **Update (F8)** to save any changes.

## Order Close Window

To display this window, select **Close Order (F22)** on the Enter Order Item Details window.

Use this window to view details of the order lines, highlight stock shortages and provide sourcing facilities. You can also add items and charges.

The upper part of the window confirms the customer and contact details. This is followed by the list of order lines that have been recorded, including the [buying list](#) description, quantity, line value and line discounts. The window displays a warning message if the account is currently over the credit limit.

**Fields****Select (Untitled)**

This is linked to the Quantity field.

Enter one of the following:

1 - To source stock if there is problem sourcing stock from customer's default stockroom

This displays the Order Close Source an Item pop-up.

2 - To display the Pricing Detail Enquiry for your selected item

For more information, see the Whole Order Enquiry Summary Pricing Details window in Sales Order Processing.

**Functions****Pricing (F9)**

Use this to display the pricing details if you are using Advanced Pricing.

**Add an Item (F10)**

Use this to display the Add an Item pop-up to add an item to the [call list](#).

### Actions (F13)

Use this to display the Order Close Actions pop-up.

Select **Update (F8)** to save any changes and display the Order Close Acceptance window.

## Order Close Source an Item Pop-up

To display this pop-up, enter 1 against an item and then press Enter on the Order Close window.

Use this pop-up to view the current stock position over all stockrooms for your selected item. If an alternative has been identified this is also listed. You can then make a sourcing decision.

There are three ways to source stock:

- 1 Ship the same item from a different stockroom.
- 2 Ship a replacement item from the normal stockroom.
- 3 Ship a replacement item from a different stockroom.

**Caution:** Items cannot be sourced from bonded warehouses.

### Fields

#### Select (Untitled)

Enter one of the following:

- 1 - To select the sourcing stockroom for this item
- 2 - To display the stock position in more detail for your item and selected stockroom

This displays the Stock Figures pop-up.

Enter an option and then press Enter to continue. The window that is displayed depends on the option selected.

## Stock Figures Pop-up

To display this pop-up, enter 2 against a stockroom and then press Enter on the Order Close Source An Item pop-up.

Currency code and currency conversion details are also displayed if the customer is a currency customer.

Select **Previous (F12)** to re-display the Order Close Source an Item pop-up.

## Order Close Actions Pop-up

To display this pop-up, select **Actions (F13)** on the Order Close window.

Use this pop-up to select the order close actions.

### **Select (Untitled)**

Enter **1** against an action:

Display Whole Order Details

This displays the Actions - Display Whole Order Details pop-up.

Display Customer [Promotions](#)

This displays the Actions - Display Customer [Promotions](#) pop-up.

Display [Sales Prompts](#)

This displays the Actions - Display [Sales Prompts](#) pop-up.

Maintain Order Text

This displays the Text Entry pop-up for the order.

Maintain Payment Details

This displays the Order Close Maintain Payment Details pop-up.

Maintain Contact Text

This displays the Text Entry pop-up for the contact.

Additional Overrides

This displays the Actions - Additional Overrides pop-up.

Enter 1 to select the option you want to use and then press Enter to continue.

## Order Close Maintain Payment Details Pop-up

To display this pop-up, enter 1 against the Maintain Payment Details action and then press Enter on the Order Close Actions pop-up.

Use this pop-up to maintain payment details for this customer and order combination. Payment terms are usually defined in Accounts Receivable. An order can be paid on a daily, monthly, or periodic basis in the form of cash, cheque, bankers draft, etc. These must be defined in Cash Management.

### **Fields**

#### **Payment Terms**

This consists of three fields that are used to define the default payment terms when you set up customers for this company. The terms defined here are the standard terms for this company. You can change them for individual customers.

The first field is a single character code that defines the type of terms:

D - Number of days from invoice date

M - Net monthly account number of months and payment due date

P - Periodic range

If you use **P**, you must enter a four-digit data range. For example, you could enter 1211, in the second field, where 12 specifies the 12th of the current month and is the start of the range, and 11 specifies the 11th of the next month and is the end of the range.

For the **D** and **M** codes, leave the second field blank. For code **D**, you must enter the number of days in the third field in the format DDD. For example, for a payment of 30 days from the receipt of invoice, enter 030.

For codes **P** and **M**, the third field contains the month and the day within that month (MDD). For example:

A code of M - \_\_\_ 210 generates a payment date of the 10th of the 2nd month following the date of invoice. In this example, an invoice date of 22/4/00 generates a payment date of 10/6/00.

A code of P 2019 106 generates, for all invoices with a document date between the 20th of this month and the 19th of the next month, a payment date of the 6th of the first month after the invoice month.

### **Payment Method**

The payment method codes are defined within Cash Management. This field is optional.

Examples are: CHQ, STD.

### **Cash Discount Code**

Select a cash discount code from those defined in the Inventory Descriptions file. You would use this field when a discount is given to a customer for paying in cash for their goods.

### **Staged Discount Code**

Select a discount to give to a customer if they pay for their goods within a specific timescale.

**Note:** *The Cash Discount and Staged Discount fields are mutually exclusive.*

Select **Update (F8)** to save any changes.

## Maintain Payment Details Bank Details Override

To display this window, select **Bank Details Override (F13)** on the Order Close Maintain Payment Details pop-up.

Use this window to view any bank account details set up for this customer.

### **Functions**

**Add (F10)**

Use this to add bank details. The fields displayed depend on the country in which the bank operates.

Enter 1 to select the bank account that you want to display, select **Add (F10)** to add new bank details, or select **Previous (F12)** to re-display the Order Close Maintain Payment Details pop-up.

## Order Close Acceptance Window

To display this window, select **Update (F8)** on the Order Close window.

This window displays the sales order number, so that you can enter the customer's purchase order number and confirm the next call.

### Fields

**Customer Order Reference**

Enter the customer's purchase order number. This is mandatory if it has been requested on the Customer Sales Information window in the Customers maintenance task.

**Customer Order Date**

This field defaults to the current date but you can change it.

**Date Delivery Required**

This field defaults to the current date but you can change it.

**Next Call Date**

This field defaults to the next call date calculated from the [call profile](#) but you can change it.

**Next Call Time**

This field displays the start time of the earliest call window from the [call profile](#) but you can change it.

**Suspension Reason Code**

If [Telesales](#) has generated a suspension reason during order processing, for example, credit limit or zero price, you cannot change it.

You can select a reason code from those defined in the Inventory Descriptions file to suspend an order manually.

### Functions

**Actions (F13)**

Use this to display the action pop-up.

The actions displayed are:

Display Whole Order Details



This displays the Actions - Display Whole Order Details pop-up.

Display Customer [Promotions](#)

This displays the Actions - Display Customer [Promotions](#) pop-up.

Display [Sales Prompts](#)

This displays the Actions - Display [Sales Prompts](#) pop-up.

Maintain Order Text

This displays the Text Entry pop-up.

Additional Overrides

This displays the Actions - Additional Overrides pop-up.

Maintain Additional Charges

This displays the Order Close Maintain Additional Charges pop-up.

### **Continue (F22)**

Use this to add this order to the list of orders to be transferred to the standard Sales Order Processing order bank. The next window displayed is the [call list](#).

Press Enter to validate the data and highlight any error conditions and then select **Continue (F22)** to close the order.

## Order Close Maintain Additional Charges Pop-up

To display this pop-up, enter 1 against the Maintain Additional Charges action and then press Enter on the Order Close Actions pop-up.

Use this pop-up to add up to three additional charges to the order.

### **Fields**

#### **Charge Code**

Select a charge code from those defined against major type SUNC in the Inventory Descriptions file.

#### **Charge Amount**

You can enter an amount, or use that attached to the charge code you select.

#### **Tax Code**

If you have specified a tax code as standard for the charge code, these details are retrieved when you press **Enter**. You can also select a tax code if required.

Select **Update (F8)** to save these changes and re-display the Order Close Acceptance window.

## Incoming Calls [2/TSP]

Sales operators can access the [call list](#) by customer and take a [Telesales](#) order, regardless of whether or not it is planned.

New orders cannot be raised if the delivery address or account has a status of I (Inactive).

**Note:** *An inactive account in a customer hierarchy has no effect on its child accounts.*

**Note:** *Use Order Capture to place orders for bonded customers.*

**Caution:** Calls cannot be taken for bonded customers.

## Incoming Calls Customer Selection Window

To display this window select the Incoming Calls task.

Alternatively, select **Incoming Calls (F22)** on the Call Selection window.

Use this window to identify the customer's account.

### **Fields**

#### **Customer Account Code**

Select a customer account code.

**Note:** *Calls cannot be taken for bonded customers.*

#### **Delivery Address Seq**

Enter the customer delivery address code for this order.

### **Functions**

#### **Outgoing Calls (F22)**

Use this to display Call Selection window.

Press Enter to display the Incoming Calls Call Selection window.

## Incoming Calls Call Selection Window

To display this window, press Enter on the Incoming Calls Customer Selection window.

This displays the summary details for any existing [call profiles](#), if the call is already planned. You can use this window to access the [call profiles](#) and contact maintenance windows. You can select a planned call, a [call profile](#) without a planned call or an incoming call.

### **Fields**

#### **Select (Untitled)**

Enter one of the following:

##### 1 - Take Call

This starts the order taking cycle based upon the [call profile](#) selected.

If the call is planned, full facilities are available during order taking, including order history review and [Planned Delivery](#) support. If the call is not planned, the order can still be recorded, but order history and re-calculation of [Planned Delivery](#) values will not be done.

##### 2 - Maintain Profile

This selects the [call profile](#) for maintenance.

### **Functions**

#### **Add New Profile (F10)**

Use this to create [call profiles](#) that you can use as the basis for the subsequent order.

**Note:** *When you record an order using this option, the process is the same as making an outgoing call. However, if the call was not already in the [call list](#) you will not be able to view order history details during order entry. After completing an order, the Incoming Calls Call Select window is re-displayed.*

Press Enter to display the Establish Contact window for your incoming call.



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## Chapter 4 Enquiries

### Telesales Enquiries Introduction

There are three enquiries in [Telesales](#). They are:

- Enquire on [Call Lists](#)  
You can use this to view [call list](#) entries and any action taken on the calls; this enquiry is specific to [Telesales](#).
- Whole Order  
You can use this to view all sales orders, including [Telesales](#), [Planned Delivery](#) or [Telemarketing](#). For more information, see the Whole Order Enquiry section within the Sales Order Processing product guide.
- Stock Availability  
You can use this to view the stock position for items held in your stockrooms. For more information, see the Stock Availability Enquiry section within the Inventory Management product guide.

### Enquire on Call Lists [1/TSE, 21/TSP]

Use this enquiry to view details for a selected range of calls.

### Call Enquiry Select Window

To display this window select the Enquire on [Call Lists](#) task.

You use this window to specify the selection criteria that you want to use to generate the call enquiry.

### **Fields**

#### **Operator**

Select the operator whose calls you want to review.

**Note:** Enter \*ALL to view calls of all operators.

#### **Call Statuses Required**

Enter 1 to select each status on which you want to enquire.

Leave the field blank (default) to select a status.

**Note:** If you leave all the fields blank, then all status categories are included in the enquiry.

Press Enter to display the Call Enquiry Call Select window.

## Call Enquiry Call Select Window

To display this window, select the operator and call status you want to view and then press Enter on the Call Enquiry Select window.

This window displays the calls that meet the selection criteria. You can use this window to select the call that you want to view in more detail.

### **Fields**

#### **Operator**

This field displays your selected operator.

#### **Call Status**

This field displays your selected call status.

#### **Select (Untitled)**

Enter 1 to display the Call Enquiry Detail window.

Select the call that you want to view in more detail and then press Enter to display the Call Enquiry Detail window.

## Call Enquiry Detail Window

To display this window, select a call and then press Enter on the Call Enquiry Call Select window.

Use this window to view details of the selected call.

### **Fields**

**Call Status**

This field displays the call status for your selected call.

**Customer**

This field displays the customer name, delivery address sequence number and address details.

**Telephone**

This field displays the customer telephone number.

**Contact**

This field displays the contact name at the customer's premises.

**Buying List**

This field displays the [buying list](#) you use for this call.

**T/S Type**

This field displays the category of [Telesales](#) call for your selected call, as follows:

- 1 - [Telesales](#)
- 2 - [Planned Delivery](#)
- 3 - [Telemarketing](#)

**Oper**

This field displays the code for the operator that is assigned to this call.

**Operator Name**

This field displays the name of the operator.

**Call Date**

This field displays the scheduled date of the call.

**Time**

This field displays the scheduled time of the call.

**Expected Call**

This field displays the time when [Telesales](#) expects the operator to make this call.

**Target Call**

This field displays the date and time at which the operator was, or is, targeted to make this call.

**Actual Call**

This field displays the actual date and time at which the operator made the call.

**Functions**

**Call Actions (F13)**

Use this to display the Call Enquiry Detail Call Action pop-up with a list of actions for the call. You can expand each action to view the operator who recorded the action and the reason code for the action.

Press Enter to display the Call Enquiry More Detail window.

## Call Enquiry More Detail Window

To display this window, press Enter on the Call Enquiry Detail window.

This window displays more details of your selected call.

**Fields****Call Status**

This field displays the call status for your selected call.

**Customer**

This field displays the customer name, delivery address sequence number and address details.

**Our Order Number**

This field displays the sales order number for this call.

**Type**

This field displays the order type. For more information about order types see the Sales Order Processing product guide.

**Order Date**

This field displays the processing date for the order.

**Priority**

This field displays the priority assigned to this order for stock allocation. For more information about order priority, see the Sales Order Processing product guide.

**Cust Order Ref**

This field displays the customer's order number.

**Cust Order Date**

This field displays the date on which the customer placed the order.

**Delivery Date**

This field displays the customer's preferred delivery date.

**Order Value**

This field displays the basic order value.



**Charges**

This field displays additional charges added to the order value.

**Price List**

This field displays the price list used for the order. You can maintain price lists in Sales Order Processing.

**Discount Group**

This field displays the discount list used for this order. You can maintain discount lists in Sales Order Processing.

**Cash Discount Code**

Enter a cash discount code if your company gives a discount to a customer for paying cash for their goods.

You can define these in the Inventory Descriptions file within Inventory Management.

**Note:** *If you enquire on a closed call, for example if the order is suspended because your customer has exceeded their credit limit, then the following Suspension Details are displayed:*

**Code**

This field displays the suspension code. These are defined in the Inventory Descriptions file under major type SUSP. You can also define these codes within Sales Order Processing.

**Date**

This field displays the date on which the order was suspended.

**Description**

This field displays the description associated with the description code.

**Functions****Call Actions (F13)**

Use this to display the Call Enquiry Detail Call Action pop-up with a list of actions for the call. You can expand each action to view the operator who recorded the action and the reason code for the action.

**Order Enquiry (F19)**

Use this to display the Whole Order Enquiry window. This is only available if you enquire on a call that is complete, that is, the call status is at 7 and the order has been created.

## Call Enquiry Detail Call Action Pop-up

To display this pop-up, select **Call Actions (F13)** on either of the Call Enquiry Detail windows.

The option displayed in this pop-up depends on the status of the order on which you are enquiring.

### **Fields**

Enter 1 to display the Call Action Detail pop-up for one of the following actions:

- Call Rescheduled - To display the details of the rescheduling of this call
- Call Aborted - To display the details of the aborting of this call
- Operator Changed - To display the details of the change of operator of this call
- Call Expire - To display the details of when this call expired
- Call Selected - To display the details of the selection of this call
- Order Ended - To display the details of the closing of this order
- Return Taken - To display returns for a type 4 order

Enter 1 next to a call action and then press Enter to display the Call Action Detail pop-up.

## Call Action Detail Pop-up

To display this pop-up, enter 1 against a call action and then press Enter on the Call Enquiry Detail Call Action pop-up.

Use this pop-up to view more detail about the selected call action. The information displayed includes the date and time upon which the action was generated, what the action was, and which operator processed the action.

### **Fields**

#### **Date**

This field displays the date on which the action was generated.

#### **Time**

This field displays the time at which the action was generated.

#### **Action**

This field displays the action that was generated.

#### **Operator**

This field displays the operator who generated the action.

Select **Previous (F12)** to re-display the Call Enquiry Detail Call Action pop-up.

## Whole Order Enquiry [2/TSE]

Use this task to view a multi-level display of order details. From the display of the details of the whole order, you can view a more detailed inspection of both order header and order line information.

This task is the same as the Whole Order Enquiry in Sales Order Processing. For more information, see the Whole Order Enquiry Selection Window section in the Sales Order Processing product guide.

## Stock Availability Enquiry [3/TSE]

Use this enquiry to display the following details for an item in a selected stockroom:

- Stock availability
- Outstanding purchase and sales orders
- Order lines requiring allocation of the item
- Order lines already allocated to the item
- Order lines with the item on pick
- Reservations against purchase orders

This task is the same as the Stock Availability Enquiry in Sales Order Processing. For more information, see the Stock Availability Enquiry Selection Window section in the Sales Order Processing product guide.



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## Chapter 5 Reports

### Telesales Reports Introduction

You can use the following reports in [Telesales](#):

- Customer Details
- [Sales Prompts](#)
- [Operator Profiles](#)
- Reason Codes
- [Promotion](#) Details
- [Buying Lists](#)
- Performance Statistics

### Report by Customer Details [21/TSE]

Use this task to produce a report that shows all the information concerning [Telesales](#) customers. You can use this information as a general audit, or to display the status of an individual account.

[Print Settings](#)

**Frequency - As required**

**Stationery - Standard listing paper**

**Print Positions - 132**

**New Page - Customer change/overflow**

**Totals - None**

## Customer Details List Select Window

To display this window select the Report by Customer Details task.

Use this window to specify the selection criteria for your report.

### **Fields**

#### **Customer Range From/To**

Select a range of customers for which that you want to process this report. You can also select a single customer, or leave these fields blank to include all customers.

#### **Customer Contacts**

Enter one of the following:

0 - To omit [customer contact](#) details from the report

1 - To include [customer contacts](#) in the report

#### **General Text**

Enter one of the following:

0 - To omit general text from the report

1 - To include general text in the report

#### **Call Profiles**

Enter one of the following:

0 - To omit [call profile](#) details from the report

1 - To include [call profile](#) details in the report

#### **Buying Lists**

Enter one of the following:

0 - To omit [buying list](#) details from the report

1 - To include [buying list](#) details in the report

#### **Delivery Profiles**

Enter one of the following:

0 - To omit [delivery profiles](#) from the report

1 - To include [delivery profiles](#) in the report

Select **Submit (F8)** to process the report.

## Report by Sales Prompts [22/TSE]

Use this task to produce a report that lists details of all [sales prompts](#) for a particular date range.

### Print Settings

**Frequency - As required**

**Stationery - Standard listing paper**

**Print Positions - 132**

**New Page - Overflow**

**Totals - None**

## List Sales Prompts Select Window

To display this window the select Report by [Sales Prompts](#) task.

Use this window to specify the date or date range that you want to use to produce your report.

### Fields

#### **Effective Date From/To**

You can select a range of dates or a single date. Leave these fields blank to produce a report for all [sales prompts](#) regardless of effectivity dates.

Select **Submit (F8)** to process the report.

## Report by Operator Profiles [23/TSE]

Use this task to produce a report that lists current operator details. You can include operator text within the report.

### Print Settings

**Frequency - As required**

**Stationery - Standard listing paper**

**Print Positions - 132**

**New Page - Overflow**

**Totals - None**

## List Operator Profiles Select Window

To display this window select the Report by [Operator Profiles](#) task.

Use this window to specify the selection criteria you want to use to produce your report.

### Fields

#### **Operator**

Select a single operator, or leave this field blank to select all operators.

#### **Operator Text**

Enter one of the following:

0 - To omit operator text from the report

1 - To include operator text in the report

Select **Submit (F8)** to process the report.

## Report by Reason Codes [24/TSE]

Use this task to produce a report that lists the current reason codes and descriptions.

### Print Settings

**Frequency - As required**

**Stationery - Standard listing paper**

**Print Positions - 132**

**New Page - Overflow**

**Totals - None**

Select **Submit (F8)** to submit the job.



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## Report by Promotion Details [25/TSE]

This report lists the details of current [promotions](#) for a particular date range.

### Print Settings

**Frequency - As required**

**Stationery - Standard listing paper**

**Print Positions - 132**

**New Page - Overflow**

**Totals - None**

## Promotion Details List Select Window

To display this window select the Report by [Promotion](#) Details task.

Currency code and currency conversion details are also displayed if the customer is a currency customer.

### Fields

#### **Effective Date From/To**

Enter a range of dates or a single date. Leave these fields blank to include all [promotions](#) regardless of effectivity date.

#### **Item Code**

Select an item, or leave this field blank to print [promotions](#) for all items.

#### **Promotion Text**

Enter one of the following:

0 - To omit [promotional](#) text from the report

1 - To include [promotional](#) text in the report

Select **Submit (F8)** to process the report.

## Report by Buying Lists [26/TSE]

Use this task to produce a report that lists the details of a [buying list](#).

### Print Settings

**Frequency - On request**

**Stationery - Standard listing paper**

**Print Positions - 132**

**New Page - Buying list change, overflow**

**Totals - None**

## Print Buying Lists Select Window

To display this window select the Report by [Buying Lists](#) task.

Use this window to specify the selection criteria that you want to use to produce your report.

### **Fields**

#### **Buying List From/To**

Enter a range of [buying lists](#) or a single [buying list](#). Leave these fields blank to print all [buying lists](#).

#### **Print Item Description**

Enter one of the following:

0 - To omit item description details from the report

1 - To include item description details in the report

Select **Submit (F8)** to process the report.

## Report by Performance Statistics [27/TSE]

Use this task to produce a report on operator performance and average call duration.

### **Print Settings**

**Frequency - Daily or as required**

**Stationery - Standard list paper**

**Print Positions - 132**

**New Page - Overflow**

**Totals - Date change, operator change, and end of report**

## Performance Statistics Select Window

To display this window select the Report by Performance Statistics task.

Use this window to specify the selection criteria that you want to use to produce your report.

### Fields

#### **Operator From/To**

Enter a range of operators or a single operator. Leave these fields blank to include all operators.

#### **Date From/To**

Enter a range of dates or a single date. Leave these fields blank to include all dates.

#### **Summary Only**

Enter one of the following:

0 - To report the totals on each call made

1 - To print only totals

Select **Submit (F8)** to process the report.



### Subsystem Introduction

**Note:** *The Order Bank Update task is compatible with Work Management; you can run it as part of a Business Process in @ctive Modeler.*

To maximise the speed that orders are accepted via [Telesales](#), and control the automatic scheduling of calls, certain functions run in a separate subsystem. These functions are known as sleepers, and you can activate these when required. The function of the subsystem is as follows:

- To update the standard order bank. When you close a call, this sleeper is activated and the order is written to the standard order bank. Once accepted these orders are treated as normal orders in Sales Order Processing.
- To activate the automatic call scheduler. Every five minutes this sleeper reviews the [call lists](#), to decide whether or not calls have expired by time, and whether they can be scheduled out to a later time.

Please refer to Subsystem Processing.

### Telesales Company Profile [1/TSU]

You can operate [Telesales](#) for a number of companies. To do this you must maintain the characteristics of each company in turn.

Before you can set up a [Telesales](#) company, you must create a company profile for the company in both Inventory Management and Sales Order Processing.

## Company Profile Company Selection Window

To display this window select the [Telesales](#) Company Profile task.

Use this window to select the company you want to maintain.

### **Fields**

#### **Select (Untitled)**

Enter **1** to select the company you want to maintain.

Enter 1 to select the company and automatically display the Company Profile Maintain Controls window.

## Company Profile Maintain Controls Window

This window is automatically displayed when you select a company on the Company Profile Company Selection window.

Use this window to create and maintain the standard controls.

### **Fields**

#### **Default Telesales Type**

Use this field to define the default type of order to use for [call profiles](#) and for any incoming calls with no [call profile](#).

Enter one of the following:

- 1 - If this is a pre-arranged [telesales](#) call to a customer to discuss a pre-defined list of items, and to take an expected order
- 2 - If the customer gives the current stock level of an item and [Telesales](#) suggests the order size required to cover the period until the next order
- 3 - If the operator can view the available [buying lists](#) and selects the most appropriate list to discuss with the customer.

#### **Maintain Performance Statistics**

Enter one of the following:

- 0 - If you do not want to record the call time statistics
- 1 - To record the time taken by the operator to make each phase of the call cycle

#### **Message Queue for Break Messages**

Enter the name of the print queue to which you want to direct break messages.

#### **Library**

Enter the library of the print queue.

**Standard Working Day**

You can specify the number of hours, between 0.0 and 24.0, normally worked by [telesales](#) operators. This is the default standard working day; you can use this when you plan work schedules.

**Standard Call Duration**

You can specify the default length of a customer call in minutes, in the range 0 to 999. You can use this when you plan work schedules.

**Standard Rest Period per Hour**

You can specify the standard rest period in minutes, in the range 0 to 15. You can use this when you plan work schedules.

**Default Buying List Code**

Enter the default [buying list](#) that you want this company to use to generate the base order details for incoming calls with no profile. This is also the default [buying list](#) for [call profiles](#) that have no [buying lists](#) defined to them, or if you have not defined a [buying list](#) when you generate [call lists](#).

**Number of Weeks per Month**

Enter the number of weeks per month. [Telesales](#) uses this to convert period sales data to week sales data for the [planned delivery](#) calculations.

**Pricing Option**

Enter one of the following to determine the pricing level that you want to use:

- 0 - If there is no pricing carried out at all
- 1 - If the pricing is calculated overnight
- 2 - If the pricing is carried out as you enter items
- 3 - If the pricing is carried out when you create the order

**Stock Checking/Allocation**

Enter one of the following:

- 0 - For no stock check and to place stock on back order
- 1 - For stock check and to place stock on back order
- 2 - For stock check and to allocate stock if available, or place on back order as appropriate

**Functions****Presentation Design (F15)**

Use this to display the Order Presentation Maintain window.

**Next Call Logic (F16)**

Use this to display the Maintain Next Call Logic window.

Press Enter to check the information and display the Company Profile Maintain Policy Controls window.

## Company Profile Maintain Policy Controls Window

To display this window, press Enter on the Company Profile Maintain Control window.

Use this window to specify the standard policy controls of the company.

**Note:** You must enter the contact type, text types and description IDs before you select Update (F8).

### **Fields**

**Note:** Once you have entered and saved these controls, you cannot change them.

#### **Contact Type**

Enter the type of contact used by [Telesales](#).

#### **Text Type**

Enter the type of text maintained by [Telesales](#).

#### **Text Sub-Types**

Enter a code to classify the text used by [Telesales](#).

#### **Description Ids**

Enter the codes used in the description file for allowed [promotions](#) and delivery routes.

#### **Short Names**

Enter three-character short names for the months of the year and days of the week.

### **Functions**

#### **Presentation Design (F15)**

Use this to display the Order Presentation Maintain window.

#### **Next Call Logic (F16)**

Use this to display the Maintain Next Call Logic window.

Select **Update (F8)** to check and save any changes.

## Order Presentation Maintain Window

To display this window select **Presentation Design (F15)** on either of the Company Profile Maintain Controls windows.



Use this window to determine the format of the Order Line Entry window so that you can simplify the operator's task. You can change the format of item numbers and descriptions, edit order quantities and change the display of previous order history.

## **Fields**

### **Item Style Details**

#### **Header**

Enter the header to display over the list of items.

#### **Item Pos From/To**

Enter the elements of the item code to display, in the form nn, where nn is a number between one and 15, and 15 is the maximum length of the item code.

#### **Separator**

Enter the character to print between the item code and item description.

#### **Desc Pos From/To**

Enter the elements of the item description code to display, in the form nn.

*Note: The combined length of the Item and Description masks cannot exceed 30 characters.*

### **Order Quantity Details**

#### **Heading 1**

Enter the heading to display over the Order Quantity field if you use [Telesales](#) or [Telemarketing](#).

#### **Heading 2**

Enter the heading to display over the customer stock quantity if you use [Planned Delivery](#).

#### **Format**

Enter one of the following to specify the number of decimal places you want to use on the entry field:

- 0 - For eight digits with no decimal places
- 1 - For six digits with one decimal place
- 2 - For six digits with two decimal places
- 3 - For six digits with three decimal places

### **Previous Order Detail**

#### **Date Format**

Enter one of the following to specify the format of the date of previous orders:

- 1 - For a format of dd/mm/yyyy
- 2 - For a format of dmmm yyyy

3 - For a format of mmm ddyyyy

**Which Qty**

Enter one of the following to specify how you want to display order history:

- 1 - To display the order quantity
- 2 - To display the delivered quantity

**No. Of Orders**

Enter the number of orders or weeks history to display during order entry.

**By Date/Week**

Enter one of the following:

- 1 - To display the previous orders by date
- 2 - To display the previous orders by week

Select **Update (F8)** to validate and save the changes.

## Maintain Next Call Logic Window

To display this window select **Next Call Logic (F16)** on either of the Company Profile Maintain Controls windows.

Use this window to control the sequence in which [Telesales](#) considers calls.

**Fields**

You use the displayed table to categorise calls by day and time.

To establish the call sequence, enter a letter from A to L, where the first call you want to display on the list is A and the last call to display on the list is L.

For example, enter A in the area on the table that represents the first call sequence you want to display, B in the next and so on through to L which is the last call sequence you want to display.

Select **Update (F8)** to validate and save the changes.

## Activate Today's Sales Prompts [31/TSU]

Use this task to activate all [sales prompts](#) that are effective on today's date.

Select **Confirm (F8)** Submit to submit the job.

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## Appendix A Glossary

### **Buying List**

This is the list of items that you want to discuss with a customer or group of customers. You can have up to 999 panels within each list with up to 12 items on each panel. You can enter the number of the panel of the buying list that you want to view during the order taking process.

### **Call List**

A system generated list of calls that are due to be made, which includes a list of items and the order history

### **Call Management**

You can use this to view the workload of all operators and to redistribute it to match resources.

### **Call Profile**

This is the information about any call that you need to make to a customer; it includes the customer contact, operator, buying list, type of call, and the frequency and timing of the call.

### **Customer Contact**

The details of the contact for the customer including internal telephone number, job title and supporting text

### **Delivery Profile**

This defines the acceptable times for delivery, delivery area and contact information.

### **Item Family**

You can group together a number of items into an Item Family. You can do this when you calculate the average sales per week for planned delivery. This is to allow for promotion of substituted items.

### **Operator Profile**

This defines the authority and skill level of the operator. Telesales uses this information to prepare and present the list of calls that an operator needs to make.

### **Planned Delivery**

The customer provides the information about the current stock level, and Telesales suggests the size of order needed to cover the period until the next expected order is taken.

### **Promotion**

You can flag any item as a promotional item. You can restrict a promotion to customers, customer groups, sales areas and regions or price lists and discount lists. You can use promotions to substitute one item for another.

### **Sales Prompts**

These messages are displayed at the top left of the order entry windows. These are to continually remind the operator of key points during the order entry process.

### **Telemarketing**

You can use Telemarketing to view the available buying list and select the most appropriate for discussion with the customer.

### **Telesales**

You can use this function to make pre-arranged calls to customers to discuss a pre-defined list of items and to take an expected order.